Sitka Evergreen Training Manual

Evergreen 2.8

Sitka Evergreen Training Manual: Evergreen 2.8

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Chapter 1. New in Evergreen Version 2.8

1.1. New Features on Video

Watch the new features of Evergreen 2.8 now!

1.2. OPAC/Catalogue

- New item status: Lost and Paid
- View/edit button in holdings grid in catalogue view
- Option to place another hold on the same title on the staff client
- Permalink on record details screen, which provides a simplified URL for individual records
- Messages in My Account: staff may leave messages for patrons, which are displayed in My Account
- Email notification opt-out setting in My Account in OPAC and patron account in staff client.

1.3. Administration

- A new library setting: Do not change fines/fees on zero-balance LOST transaction to allow libraries to not void lost charges on returned lost and paid items.
- Two new library settings: Void lost item billing when claims returned and Void lost item processing fee when claims returned to allow libraries to void lost charges when a lost item is marked claimed returned. You may consider using these new settings if your library automatically marks long overdue items lost.

1.4. Reports

- New *Field Hint* field for template filters, which allows notes to be displayed on Report Creation screen. Co-op support plans to add informational notes to some filters after the upgrade.
- View/edit existing reports, which allows new reports to be created by editing existing reports or recurring reports to be updated or rescheduled.

Chapter 2. Revisions to Version 2.8 and Attributions to Contributors.

Version 2.8 of this manual was published July 13, 2015. Below are subsequent content changes in reverse chronological order. Minor changes including spelling corrections, formatting changes, and cosmetic screenshot updates are excluded.

BC Libraries Cooperative acknowledges the Documentation Interest Group (DIG) Copyright © 2008-2015 GPLS and others, for their contribution to this manual.

Revision date	Editor(s)	Description

Chapter 3. Sitka and Evergreen Resources

Sitka policy

- The *Sitka Evergreen Policy Manual* contains policy and best-practice documents supporting Sitka's consortial installation of the Evergreen ILS. See http://docs.sitka.bclibraries.ca/Policy/current/html/ for html and pdf versions.

Websites

- The BC Libraries Cooperative website (http://bc.libraries.coop/) provides information about the implementation of Evergreen in BC and MB, including Evergreen staff client downloads, Sitka documentation, and Sitka policy and governance documents.
- See the Evergreen site (http://evergreen-ils.org/) for information about Evergreen for all audiences, not specific to Sitka. Includes links to the Evergreen blog, the software development roadmap, and general documentation.

Listservs

- Join the Sitka Group on the BC Libraries Cooperative website where current member libraries discuss Sitka's implementation of Evergreen.

  Any library specific questions including patron information should be directed to Co-op Support.
- http://evergreen-ils.org/communicate/mailing-lists/: multiple lists for discussions of Evergreen. Messages sent to the General, Developer, and DIG Evergreen lists are searchable at http://georgialibraries.markmail.org/search/

3.1. Sitka Community Documentation

We encourage Sitka sites to share locally produced Evergreen documentation with the wider Sitka community. If you have any guides, tutorials, or tip sheets to share please contact Sitka support and we'll link to them in the table below.

Contributing Library	Description	Link

Chapter 4. Sitka Evergreen Support

The Co-op Support team strives to respond to new requests within 24 hours, excluding weekends. To manage requests (also referred to as *tickets*) the Support team uses ticket tracking software called Request Tracker (RT).

4.1. How to Contact Support

There are four ways to contact Co-op Support for Evergreen support:

1. **Request Tracker Interface.** Submit and track requests with RT Self Service. After logging in you may use the form to create new tickets, track the progress of open tickets, or review issues that have been resolved.

2. **Email.** Send questions to the support email address. Requests submitted by email generate RT tickets and can also be viewed online by logging in to RT Self Service.

3. **Online Contact Form.** Send questions to Co-op Support through the contact form on the BC Libraries Cooperative website. Requests submitted through the contact form generate RT tickets and can also be viewed online by logging in to RT Self Service.

4. **Phone.** Telephone support is available 9:00 AM to 4:00 PM Pacific Time, Monday to Friday, with emergency after hours support 7 days a week. Call our toll free number during regular hours to speak with support staff, or after hours to leave a message or request emergency server support. To protect our staff we do not accept anonymous calls so please ensure your caller ID is not blocked.

The Co-op Support toll free number and email address can be found on the Splash page in the Sitka Evergreen Staff Client. The toll free number can also be found on the Sitka Support page. This information is also given to libraries during migration.

4.2. Guidelines for Support Requests

Thorough and consistent reporting makes it easier for Co-op Support to respond to your requests.

- **Report problems as they occur.** Prompt reporting may help us catch a problem before it affects other patrons, respond quickly to issues that impact multiple libraries, or save you time if there is an easy solution. Please report issues as soon as is convenient.

- **One issue per request.** Please submit one issue at a time. Emails generate tickets in RT which are assigned to support team members. Reporting each question separately helps us assign, classify, and prioritize tickets more efficiently.

- **Contact information.** We strive to offer friendly, personalized service. Please include your name and use an email address where we can reach you directly.

- **Descriptive subject.** To make tickets easier to identify in RT please provide as descriptive a subject as possible.

  - Example of a descriptive subject line: *Circ+Full Cat login unable to edit item record*

  - Example of a non-descriptive subject line: *Editing question*

- **What, where, when, how?** Be specific about what you were doing in Evergreen, what results you obtained versus what you expected, and the steps required to reproduce the problem. If you cannot reproduce the problem exactly please describe the circumstances in which it occurred and the symptoms observed, including relevant patron and item barcodes.

- **Include error messages.** If the problem caused any OPAC or staff client error messages please copy and paste error text or attach screenshots when possible. See the section called “Submitting Images to Support” for guidelines.

- **Include example barcods and IDs.** A problem in circulation? Make sure you include the patron and/or item barcodes that were in use when the problem occurred. Cataloguing issues? Make sure you include the item barcode and/or the record ISBN/ISSN or record ID where the problem occured.

- **Trouble-shooting.** Spare yourself a boring or obvious email from the Support Team: tell us what steps you have already taken to try and resolve the problem.

Submitting Images to Support

When submitting images to Co-op Support please follow the guidelines below:

- **Save as a .jpg or .png.** The best file formats in which to save screenshots are .png and .jpg. These files are easily accessed by Sitka Support and are unlikely to contain viruses.

- **Do not submit .doc or .docx unless absolutely necessary.** Files saved as .doc or.docx require additional software to open them and have a higher potential for carrying viruses.

4.3. RT Self Service

Each library has a single account with which to access RT. Under this account staff are able to see all the tickets associated with their library. Not sure what the username and password are for your library's account? Contact Co-op Support to find out.

Access RT Self Service

Create New Tickets

View and Add to Existing Tickets

Review Closed Tickets

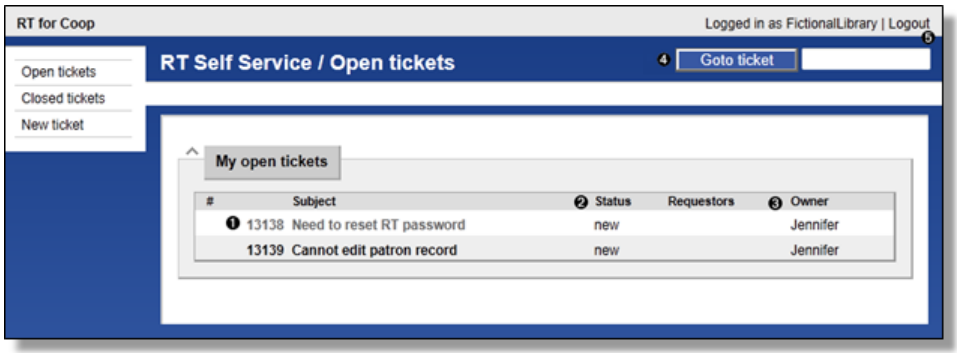
Ticket Status

Co-op Support uses RT software to receive, discuss, and respond to questions from libraries in the BC Libraries Cooperative. Requests are numbered and referred to as *tickets*, and assigned to team members according to availability and expertise.

Accessing RT Self Service

Through the RT website https://support. libraries.coop/rt/

The Self Service home page displays current tickets submitted by email or in RT.


RT for Coop
Logged in as FictionalLibrary | Logout
Open tickets
Closed tickets
New ticket
RT Self Service / Open tickets
Goto ticket
My open tickets
Subject Status Requestors Owner
13138 Need to reset RT password new Jennifer
13139 Cannot edit patron record new Jennifer

❶ Click the number or subject of any listed ticket to view past correspondence or add new information.

❷ Status usually progresses from *new* to *open* to *resolved* as a ticket is addressed. See also Ticket Status.

❸ Tickets are assigned to individual Co-op Support members depending on availability and expertise. A ticket may be owned by *Nobody* while the Support Team gathers more information about the problem.

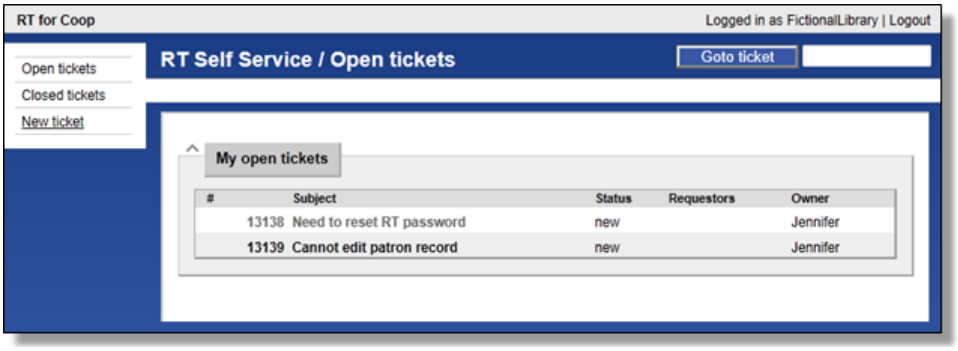
❹ Access any of your tickets by number with the *Goto ticket* field. Tickets submitted by other libraries are not visible.

❺ When finished please *Logout*.

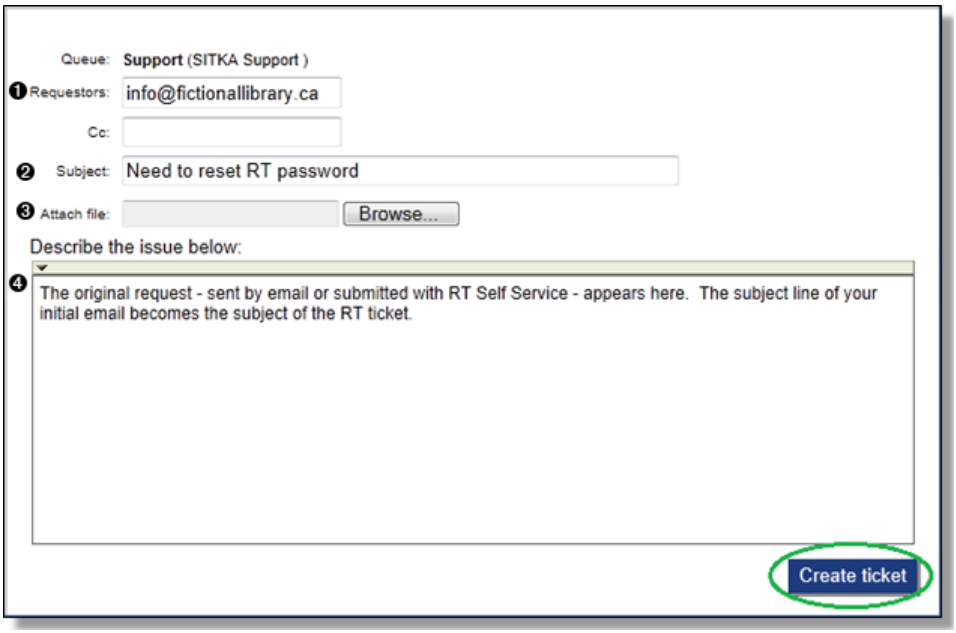
Create New Tickets

1. Login to RT Self Service as shown above.

2. Click *New ticket*.


RT for Coop
Logged in as FictionalLibrary | Logout
Open tickets
Closed tickets
New ticket
RT Self Service / Open tickets
Goto ticket
My open tickets
Subject Status Requestors Owner
13138 Need to reset RT password new Jennifer
13139 Cannot edit patron record new Jennifer

3. Complete the form and click *Create ticket*.


Queue: Support (SITKA Support)
❶ Requestors: info@fictionallibrary.ca
Cc:
❷ Subject: Need to reset RT password
❸ Attach file: Browse...
Describe the issue below:
❹ The original request - sent by email or submitted with RT Self Service - appears here. The subject line of your initial email becomes the subject of the RT ticket.
Create ticket

❶ By default the *Requestors* field contains the email address associated with your RT login. Any replies to this ticket will also be sent to this address.

❷ The *Subject* should be descriptive to make the ticket easier to identify, assign, and classify. This will also be the subject line for emailed replies.

❸ Screenshots or other files that help describe the problem may be attached here.

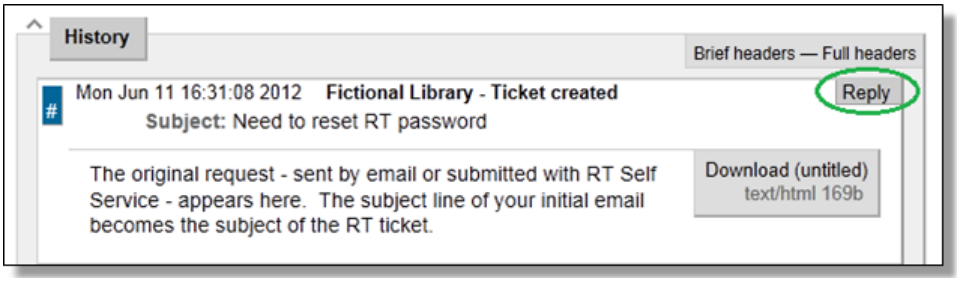
❹ For guidelines on the kind of information that may help the Sitka Team respond to your request please see Section 4.2, “Guidelines for Support Requests”.

View and Add to Existing Tickets

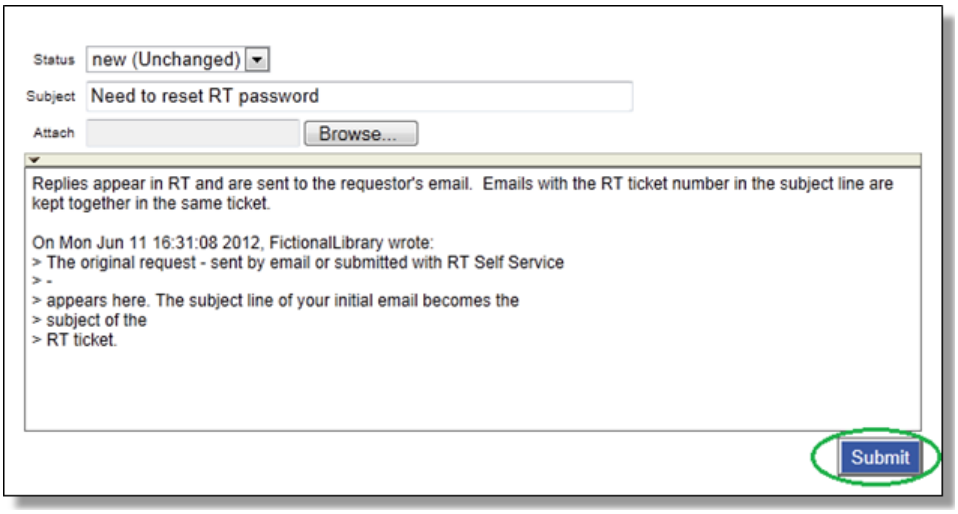
1. Login to RT Self Service as shown above.

2. Click a ticket number or subject to view details or reply.

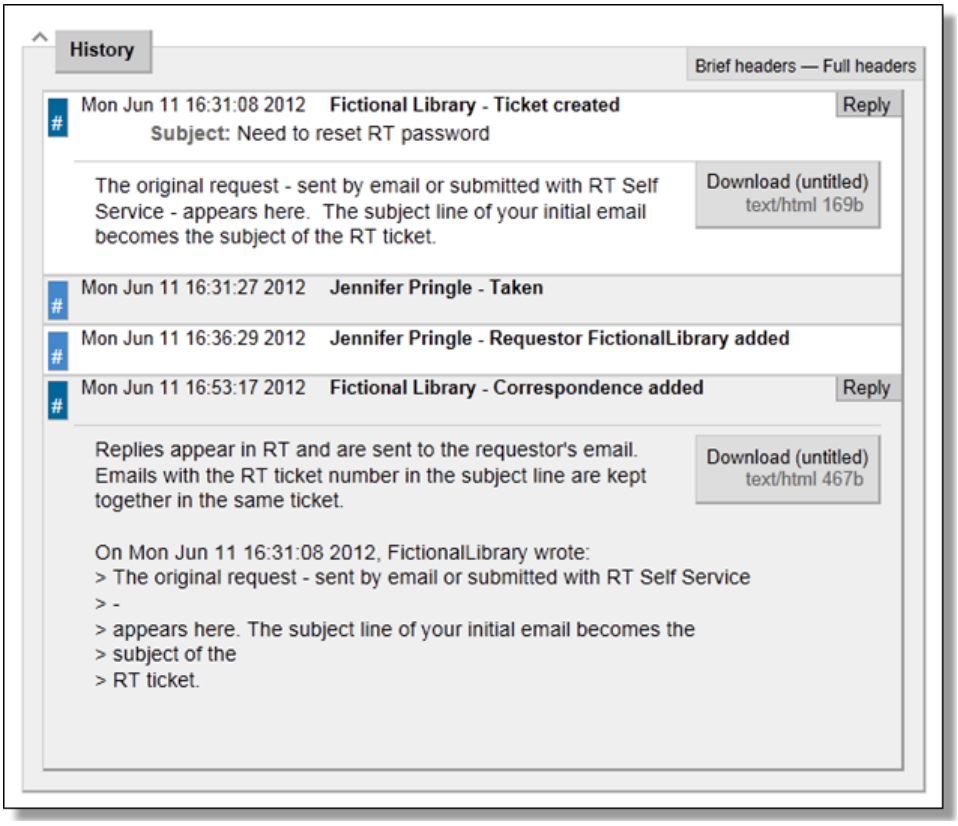
3. Additional information about the selected ticket appears, including when it was created and last updated. Also displayed is correspondence between the requestor and Co-op Support, either of whom may add to the ticket by clicking *Reply*.


History
Brief headers — Full headers
Mon Jun 11 16:31:08 2012 Fictional Library - Ticket created
Reply
Subject: Need to reset RT password
The original request - sent by email or submitted with RT Self Service - appears here. The subject line of your initial email becomes the subject of the RT ticket.
Download (untitled)
text/html 169b

4. Enter your reply in the form and click *Submit*.


Status
new (Unchanged)
Subject
Need to reset RT password
Attach
Browse...
Replies appear in RT and are sent to the requestor's email. Emails with the RT ticket number in the subject line are kept together in the same ticket.
On Mon Jun 11 16:31:08 2012, FictionalLibrary wrote:
> The original request - sent by email or submitted with RT Self Service
> -
> appears here. The subject line of your initial email becomes the
> subject of the
> RT ticket.
Submit

5. The new message is added to the correspondence history.


History
Brief headers — Full headers
Mon Jun 11 16:31:08 2012 Fictional Library - Ticket created
Reply
Subject: Need to reset RT password
The original request - sent by email or submitted with RT Self Service - appears here. The subject line of your initial email becomes the subject of the RT ticket.
Download (untitled)
text/html 169b
Mon Jun 11 16:31:27 2012 Jennifer Pringle - Taken
Mon Jun 11 16:36:29 2012 Jennifer Pringle - Requestor FictionalLibrary added
Mon Jun 11 16:53:17 2012 Fictional Library - Correspondence added
Reply
Replies appear in RT and are sent to the requestor's email. Emails with the RT ticket number in the subject line are kept together in the same ticket.
Download (untitled)
text/html 467b
On Mon Jun 11 16:31:08 2012, FictionalLibrary wrote:
> The original request - sent by email or submitted with RT Self Service
> -
> appears here. The subject line of your initial email becomes the
> subject of the
> RT ticket.

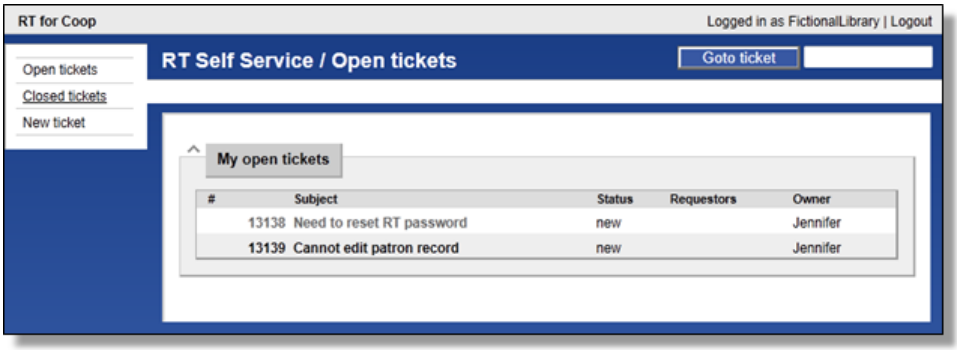
It is not possible to edit past correspondence. To make corrections please add a new reply.

Review Closed Tickets

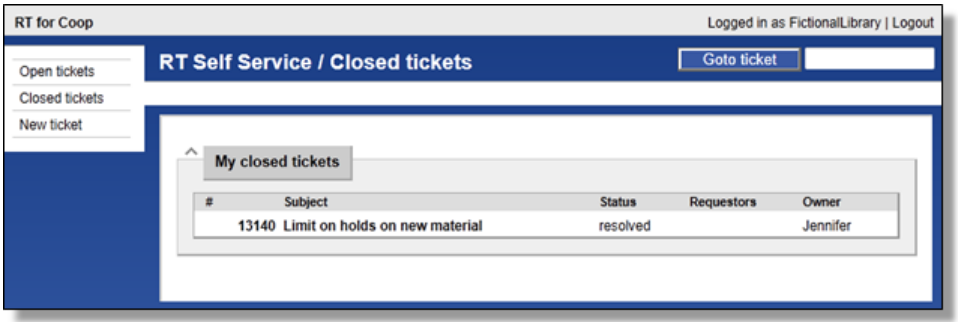
Resolved tickets do not appear on the RT Self Service welcome page but can be viewed and re-opened if a problem recurs.

1. Login to RT Self Service as shown above.

2. Click *Closed tickets*.


RT for Coop
Logged in as FictionalLibrary | Logout
Open tickets
Closed tickets
New ticket
RT Self Service / Open tickets
Goto ticket
My open tickets
Subject Status Requestors Owner
13138 Need to reset RT password new Jennifer
13139 Cannot edit patron record new Jennifer

3. Closed tickets are listed with status *resolved*. Click on a number or subject link to review a ticket.


RT for Coop
Logged in as FictionalLibrary | Logout
Open tickets
Closed tickets
New ticket
RT Self Service / Closed tickets
Goto ticket
My closed tickets
Subject Status Requestors Owner
13140 Limit on holds on new material resolved Jennifer

To re-open a closed ticket simply add a new reply. This will change the status to *open* and alert Co-op Support that more attention is required.

Ticket Status

Ticket status provides general information about a support request and affects display in RT Self Service. Most status changes are made by Co-op Support but *resolved* tickets change back to *open* with any new correspondence.

Status	Description	Displayed with
new	Recent ticket, awaiting reply from Support Team.	Open Tickets
open	Support Team has replied but the issue is not yet resolved.	Open Tickets
resolved	Issue resolved, question answered, or a satisfactory work-around identified.	Closed Tickets
stalled	No immediate solution available but future development, configuration, or policy changes may provide a fix.	Open Tickets

Chapter 5. Getting Started

5.1. Installing the Evergreen Staff Client

To use Evergreen you must first download and install the Evergreen 2.8 staff client. The customized Sitka staff client is available for download from the BC Libraries Cooperative website here: http://bc.libraries.coop/support/staff-client-executables/

Due to Sitka specific customizations on our servers the Evergreen Community 2.8 staff client will not work with the Sitka servers.

For a video tutorial on downloading, installing, and registering the staff client see: Installing the Staff Client - 4:28

5.2. Registering a Workstation

Each Evergreen staff client must have a workstation registered with every server it is used with. The workstation identifies your physical computer location and may help Co-op Support when troubleshooting.

Registration takes place when a staff client is installed for the very first time, when it connects to a new server, or if the hostname is changed.

1. Open the Evergreen staff client
2. From the *Locale* drop down menu select *en-CA : English (Canada* or *fr-CA : French (Canada)*. This sets the language preferences for the staff client.
3. Click *Apply Locale*.
4. In the *Server* section, enter the hostname in the *Hostname* field.
5. Click *Re-Test Server*. *Status* and *Version* should both display as *200 : OK*.
6. In the *Authentication* section, enter a Local System Administrator *Username* and *Password* into the appropriate fields.

Only a Local System Administrator account has the required permission to register a workstation.

7. Click *Login*.
8. In the *Workstation* section, enter a name for your workstation in the *WS Name* field.

Co-op Support recommends that a unique, meaningful name is used for each workstation, such as checkout or reference.

Do not use slash ("/") or backslash ("\") in your workstation's name as it may interfere with offline transaction uploads.

9. Select the correct organizational unit from the *Organization* drop down menu.

> Multi-branch libraries need to ensure the correct branch is selected.

10. Click *Register*.
11. A pop-up will appear to indicate successful registration. Click *OK*.
12. Re-enter the Local System Administrator account password or login using a different staff account.

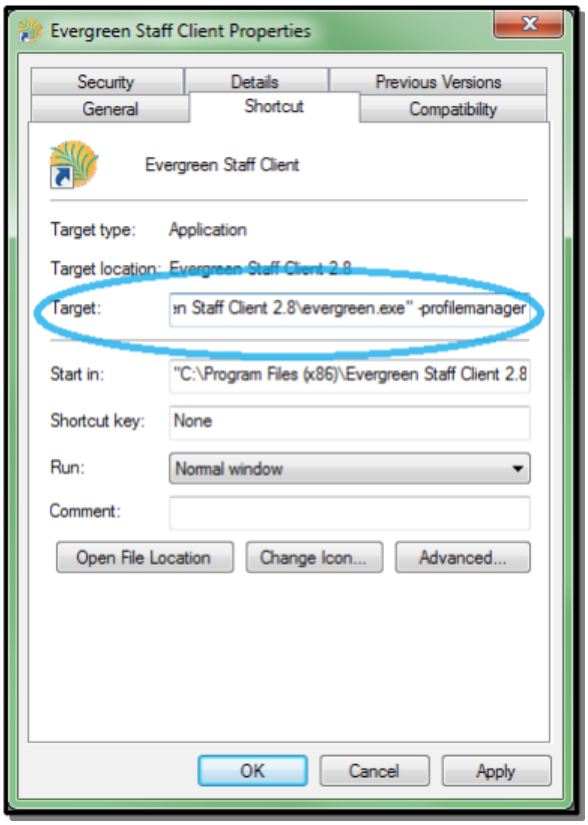
5.3. Adding the Profile Manager

The profile manager makes it possible to create multiple profiles that can be used to login to Evergreen. To use the profile manager you will need to edit the desktop shortcut once the Evergreen staff client is installed.

> The screenshots provided here are for the Windows version of the staff client but should be similar in the Linux staff client. The profile manager is not currently available for the Macintosh staff client.

1. Access *Properties* for the Evergreen staff client.
2. Add "-P" or "-ProfileManager" to the desktop shortcut

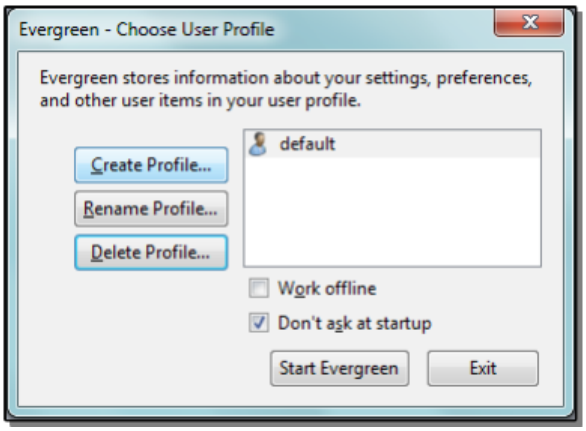
   In Windows this is done by adding -profilemanager to the end of the *Target* field.



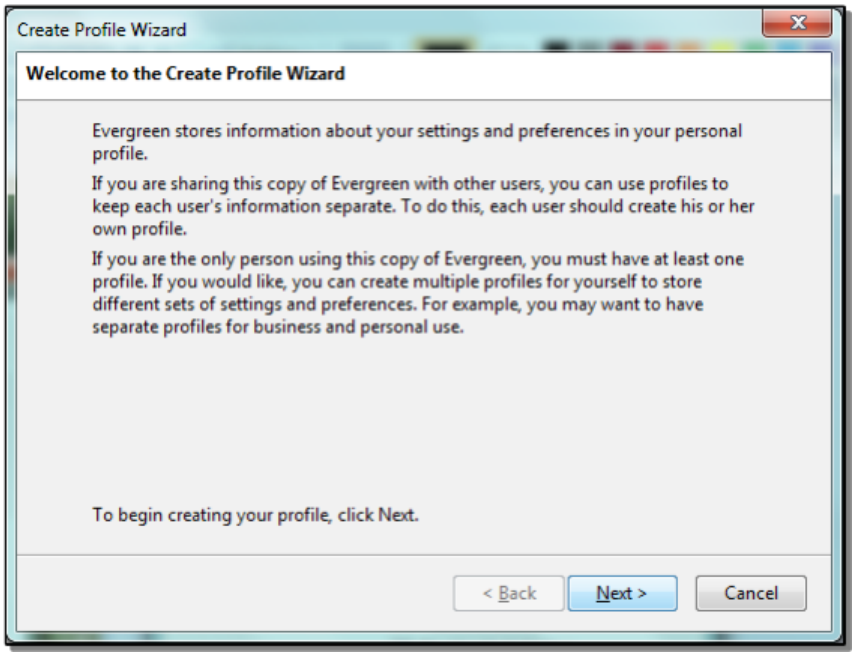
3. Click *OK*.

4. Click on the Evergreen staff client shortcut. The Profile Manager will appear.

5. Click *Create Profile*.

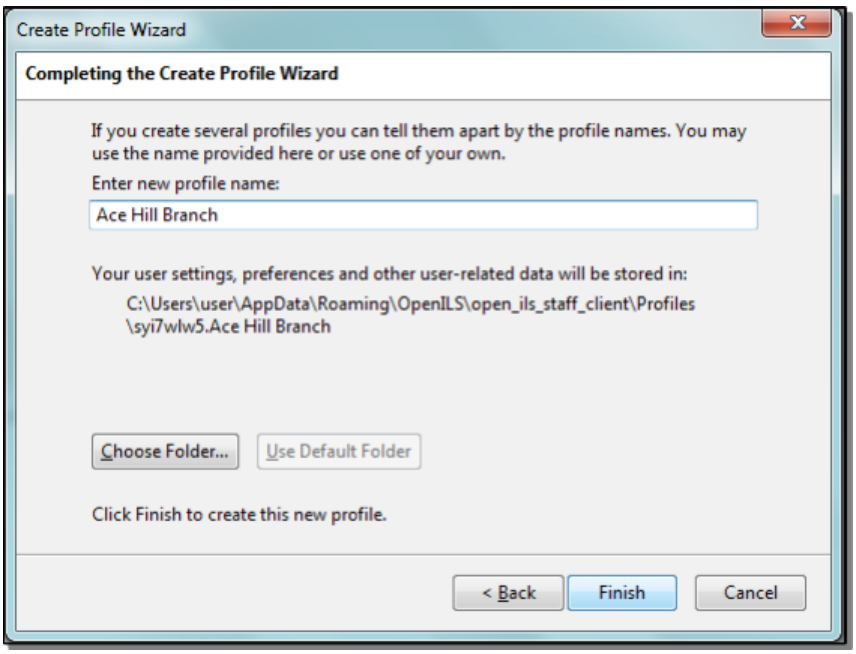


6. Click *Next*.

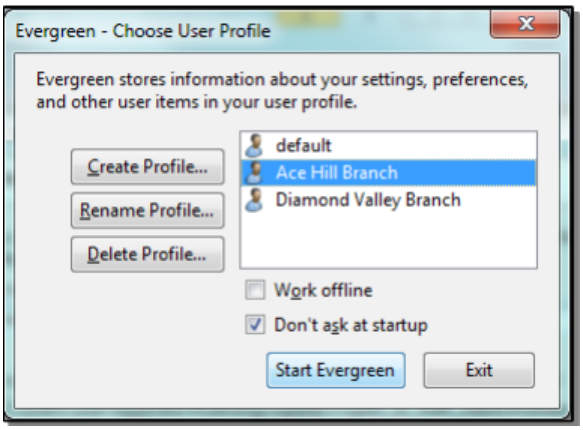

Create Profile Wizard
Welcome to the Create Profile Wizard
Evergreen stores information about your settings and preferences in your personal profile.
If you are sharing this copy of Evergreen with other users, you can use profiles to keep each user's information separate. To do this, each user should create his or her own profile.
If you are the only person using this copy of Evergreen, you must have at least one profile. If you would like, you can create multiple profiles for yourself to store different sets of settings and preferences. For example, you may want to have separate profiles for business and personal use.
To begin creating your profile, click Next.
< Back
Next >
Cancel

7. Enter the new profile name and click *Finish*.

   The profile manager will not let you use the same name twice.


Create Profile Wizard
Completing the Create Profile Wizard
If you create several profiles you can tell them apart by the profile names. You may use the name provided here or use one of your own.
Enter new profile name:
Ace Hill Branch
Your user settings, preferences and other user-related data will be stored in:
C:\Users\user\AppData\Roaming\OpenILS\open_ils_staff_client\Profiles\syi7wlw5.Ace Hill Branch
Choose Folder...
Use Default Folder
Click Finish to create this new profile.
< Back
Finish
Cancel

8. Select the profile you wish to use and click *Start Evergreen*.



5.4. Logging in to Evergreen

An account with library staff permissions is required to log in to the Evergreen staff client. Each staff member can have their own username and password, or generic logins can be used. For more information about staff profiles and permissions see Chapter 55, *Staff Accounts*.

Normal Login

1. Open the Evergreen staff client.

2. The hostname should display in the *Server* section. *Status* and *Version* should both display as *200 : OK*.

If *Status* displays as *There was an error testing this hostname.* check that the hostname has been entered correctly and that your internet connection is working.

If *Version* displays as *404 : Not Found* check that your staff client version matches the version on server you are attempting to connect to. You can check the staff client version by clicking on *Help* and selecting *About this client*. The version appears as *Target Server ID*.

3. In the *Authentication* section, enter a library staff account *Username* and *Password* into the appropriate fields.

4. Click *Login*.

Offline Login

During a network outage staff can login to the Offline Module, also known as the Standalone Interface.

See Offline Transactions for instructions on using the Offline Module.

1. Open the Evergreen staff client.

2. Click *Standalone Interface*.

3. The Evergreen Standalone Interface, also referred to as the Offline Module, will open.

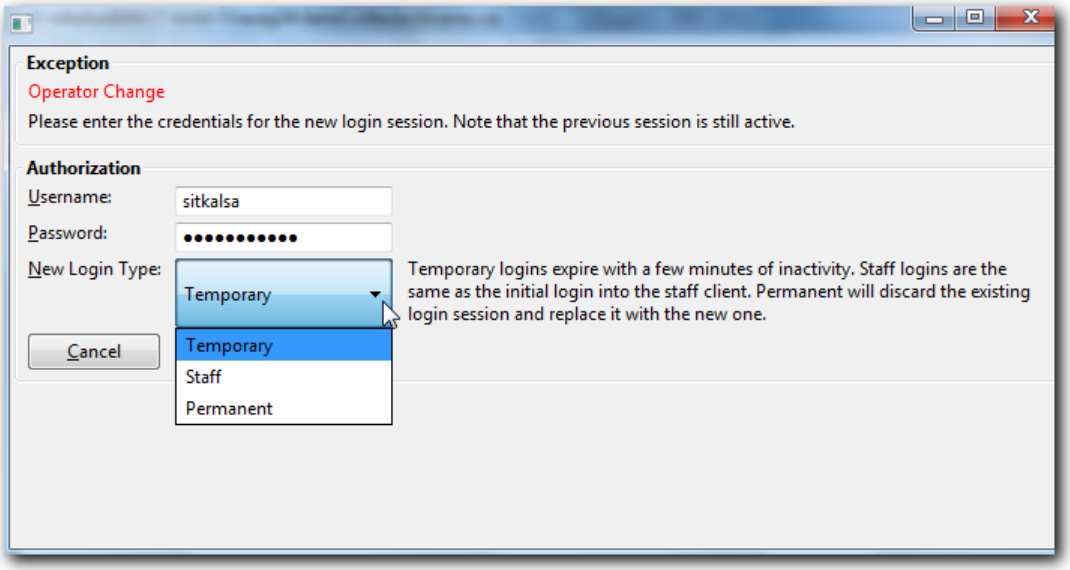
If your connection to Evergreen is lost during open hours, click *Standalone Interface* to continue with check out and patron registration functions until the connection is restored. When there are offline transactions to be uploaded in a workstation, *Offline Transactions Pending* will show up on top of *Standalone Interface* in red.

For regular uploading and processing offline transactions, use *Offline Transaction Management* on the *Admin* menu. *Export Transactions* and *Import Transactions* on the login screen are used to copy offline transaction files out of or into a workstation. They are designed for extreme cases when a workstation will not be able to connect to the network anymore.

5.5. Change Operator

The login account of a workstation can be changed to another one without logging out first. Go to *Admin* → *Change Operator:New* in Evergreen main window.

In the popup window, type in the new staff username and password. Read the instruction carefully and choose a *New Login Type* from the dropdown list. Click *Authorization*. The menu bar's background colour will be changed to red.


Exception
Operator Change
Please enter the credentials for the new login session. Note that the previous session is still active.
Authorization
Username:
sitkalsa
Password:
New Login Type:
Temporary
Temporary logins expire with a few minutes of inactivity. Staff logins are the same as the initial login into the staff client. Permanent will discard the existing login session and replace it with the new one.
Cancel
Temporary
Staff
Permanent

Temporary logins expire in a few minutes of inactivity. Choose it if you need the new account for some specific task, which can be finished very quickly. Remember to switch back to the old login once you finish it, or else staff may see the session expired prompt. The old session may NOT be restored if the timeout occurs at some screens. Log out and re-log in if it happens.

Staff logins are the same as the old login, but you can switch back to the old login at any time.

Permanent logins discard the old login and replace it. You can not switch back.

To switch back to the old account, Go to *Admin* → *Change Operator: NewUsername*.

5.6. Navigation

Tabs

Evergreen uses tabs to display functions. Tabs allow all software functionality to be open in one window. You can have multiple tabs open at once and you can have more than one tab of a single function open at the same time. You simply move through the tabs to perform your work.

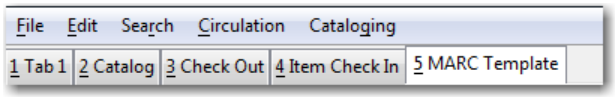
You can operate on Windows and Tabs using the dropdown menu under *File* . You can also use the plus sign beside the last tab title and the cross sign at the end of the tab title line to open a new or close the active tab. You can also use the following keyborard shortcuts/hotkeys, too. Some functions will automatically open records in new tabs.

Keyboard shortcuts/hotkeys for working with tabs:

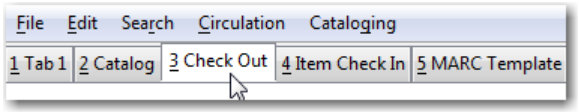
- **Ctrl**+**T** new tab
- **Ctrl**+**W** close tab

- **Ctrl+Shift+W** close all tabs
- **Ctrl+Tab** tabs forward through open tabs
- **Ctrl+Shift+Tab** tabs backward through open tabs

In the example below, the *MARC Template* tab is active. Click on any open tab to bring that screen to the front. You can also use **Ctrl+Tab** to move to the required tab



Now the *Check Out* tab is the active screen.



Once you are in the selected tab, you can use the drop down menus or keyboard shortcuts to perform required functions. Menu functions and corresponding keyboard shortcuts will be demonstrated throughout this manual.

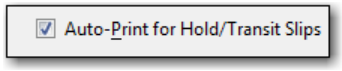
Keyboard Shortcuts/Hotkeys

Most menu items have keyboard shorcuts that can greatly increase efficiency. Below is a selected list of commonly used shortcut keys (AKA HotKeys). All or partial hotkeys can be turned off. See Workstation Administration section for details.

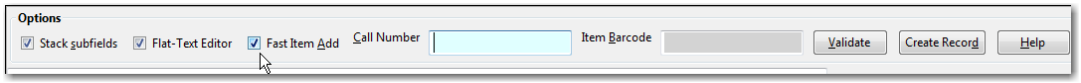
Key	Function
F1	Checkout, or retrieve patron record by barcode
F2	Checkin
F3	Catalogue search
F4	Patron search
F5	Retrieve copy by barcode
F6	Record in house use
F8	Retrieve last patron
F9	Re-print the last receipt
Shift+F1	Register new patron
Shift+F2	Capture holds
Shift+F3	Retrieve record by TCN
Shift+F8	Retrieve last patron
Ctrl+T	Open new tab
Ctrl+W	Close current tab
Ctrl+Tab	Move forward through tabs
Ctrl+Shift+Tab	Move back through tabs
Ctrl+C	Copy
Ctrl+V	Paste

Check-boxes

Most staff client check-boxes are "sticky" -- if you select or deselect them, that status persists. For example, *Auto-print*, which will print the relevant receipts automatically in certain functions, is sticky. If you select it on one login, it will persist for future logins until you uncheck the box.



Fast Item Add is another "sticky" check box that makes it possible to add volume and item records from the MARC editor.



Double Click

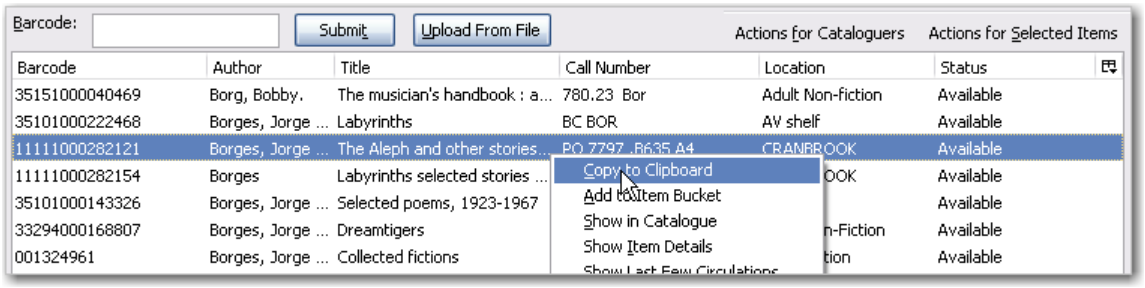
Double click a line on patron search result list opens the selected record in a new tab. Double click an item line on Holdings Maintenance opens the record with Copy Editor in a new tab.

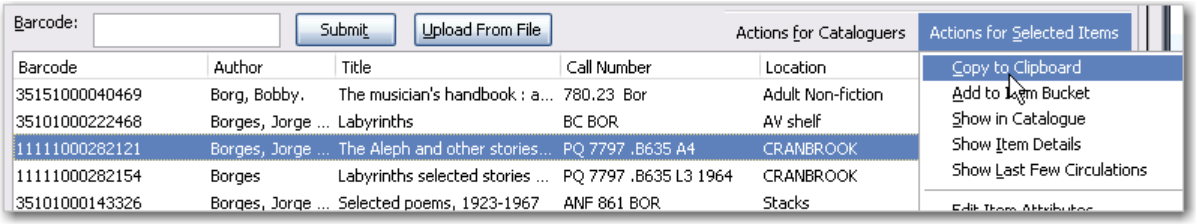
Copy/Paste

There are several methods of copying and pasting text in Evergreen, depending on where you are in the staff client and the type of information you are copying

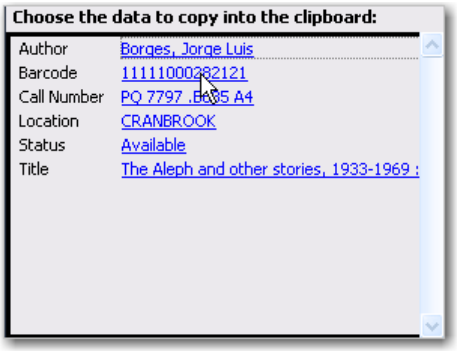
1. **Underlined blue text.** Clicking on any of the blue links in the Evergreen client copies the data to the computer clipboard (left and right click work the same way for these links). To paste into another location, use **Ctrl**+**V**.

2. **Text displayed in tables.** To copy information from a staff client table, first select the desired row then right-click and choose *Copy to Clipboard*; alternatively select *Actions for Selected Items* → *Copy to Clipboard*.

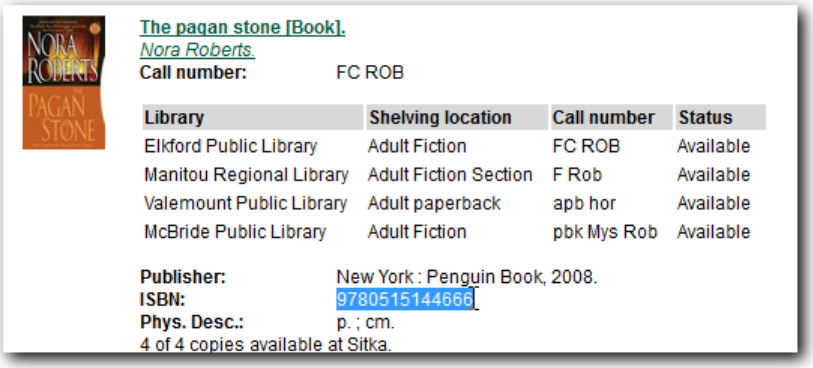




Next click the desired information in the popup to copy it to the clipboard

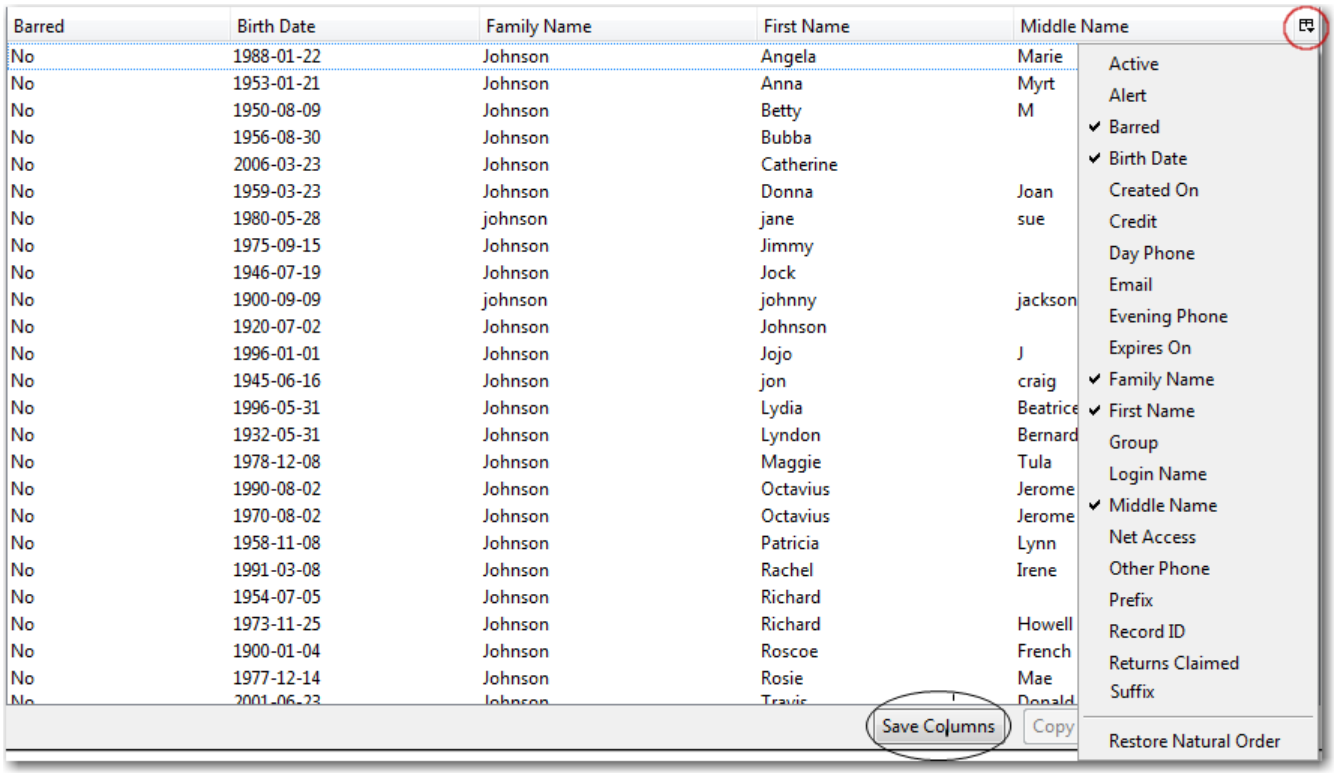


3. **Text from catalogue search results.** There is no right-click menu for copying data from staff client search results. To copy the ISBN in the example below, highlight it and click **Ctrl**+**C**. To paste into another location use **Ctrl**+**V**.



Column Picker

From many screens and lists, you can click on the *column picker* icon to change which columns are displayed.

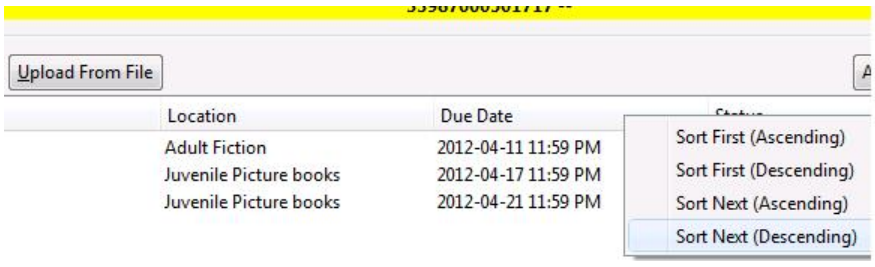


When data is displayed in columns, you can click and drag them, add new ones, or remove them. You can also sort data in a column by clicking on the column header. After customizing the display you may save your changes for future sessions under that login by right-clicking anywhere in the display area and choosing *Save Columns* from the drop-down menu. Some libraries use generic accounts and for those who do, staff need to be aware of the implications to other staff members of any changes made to the display.

Sorting Columns

You can sort a list by ascending or descending order on any screen with grid display. Clicking the label of a column sorts display by the column. One more click reverses the order.

You may sort by multiple columns. Click the column label of your first sorting column. Move the cursor to the second sorting column. Right click your mouse to choose an option from the list.



You may sort by a third column by repeating the above step.

5.7. Workstation Administration

Copy Editor: Copy Location Name First

Font and Sound Settings

Select Hotkeys

Configure Printers

Set Search Preferences

Button Bar/Toolbar

Copy Editor: Copy Location Name First

By default, when editing item records, library code is displayed in front of shelving location in *Shelving Location* field. You may reverse the order by going to *Admin → Workstation Administration → Copy Editor: Copy Location Name First*. Simply click it to make copy location name displayed first. The setting is saved on the workstation.

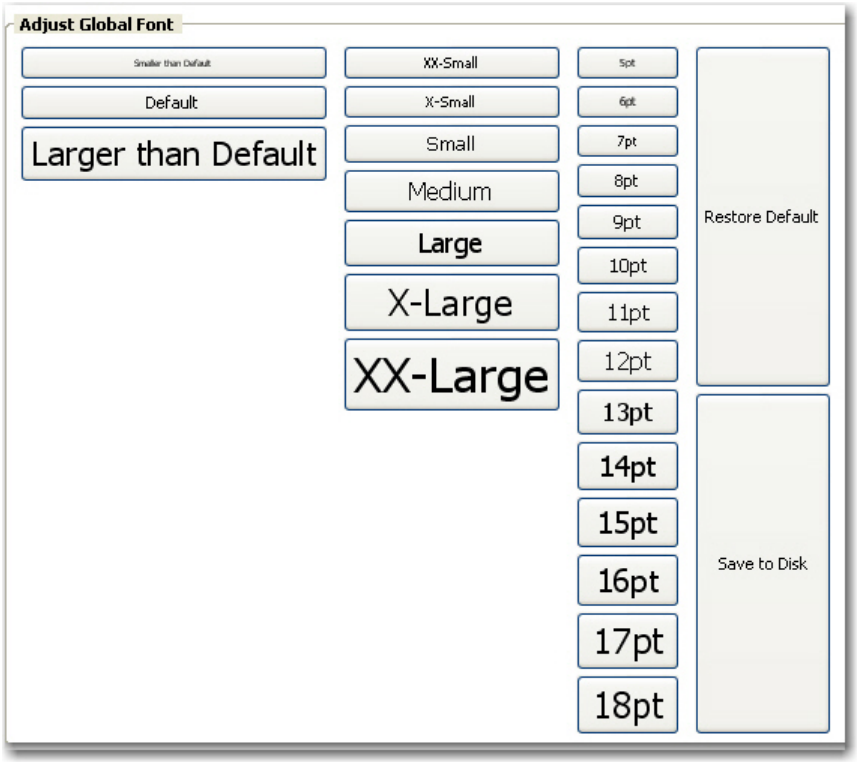
Font and Sound Settings

You may change the size of displayed text or turn staff client sounds on and off. These settings are specific to each workstation and stored on local hard disk. They do not affect OPAC font sizes.

1. Select *Admin → Workstation Administration → Global Font and Sound Settings*.

2. To turn off the system sounds, like the noise that happens when a patron with a block is retrieved, check the *disable sound* box and click *Save to Disk*.

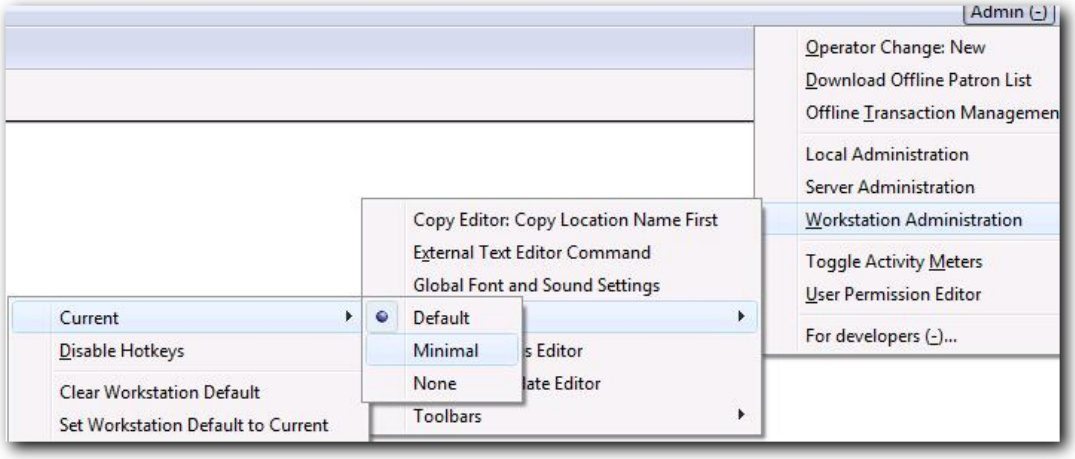
3. To change the size of the font, pick the desired option and click *Save to Disk*.



Select Hotkeys

All or partial hotkeys can be turned on or off. It can be done for all workstations at a particular library (see Library Settings for details) or for a particular workstation by going to

1. *Admin* → *Workstation Administration* → *Hotkeys* → *Current*. Select from *Default*, *Minimal*, and *None*.



- *Default*: inlcuding all hotkeys
- *Minimal*: including those hotkeys using *CTRL* key
- *None*: excluding all hotkeys

2. Go back to the above menu. Click *Set Workstation Default to Current*.

   To clear the existing default click *Clear Workstation Default*.

You can use the *Toggle Hotkeys* button, included in some toolbars, on top right corner, to switch your selected Hotkeys for the current login session on or off. It has the same effect as when you click *Disable Hotkeys* on the Hotkeys menu.

Configure Printers

Use the *Printer Settings Editor* to configure printer output for each workstation. If left unconfigured Evergreen will use the default printer set in the workstation's operating system (Windows, OSX, Ubuntu, etc).

Evergreen printing works best if you are using recent, hardware-specific printer drivers.

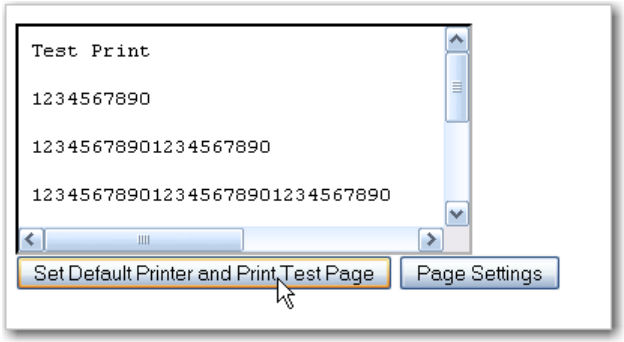
1. Select *Admin* → *Workstation Administration* → *Printer Settings Editor*.

2. Select the *Printer Context*. At a minimum set the *Default* and *Offline* context on each Evergreen workstation. Repeat the procedure for other contexts if they differ from the default (e.g. if spine labels should output to a different printer).

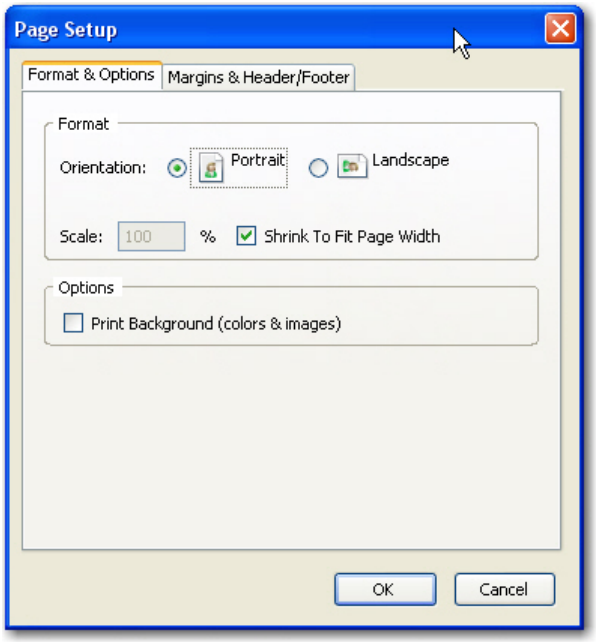
If the *Offline* context is not set receipts will not print when using the Offline Module.

Printer Context	Description
Default	Default settings for staff client print functions (set for each workstation).
Receipt	Settings for printing receipts
Label	Printer settings for spine and pocket labels
Mail	Settings for printing mailed notices (not yet active)
Offline	Applies to all printing from the Offline Interface

3. After choosing *Printer Context* click *Set Default Printer and Print Test Page* and follow the prompts. If successful, test output will print to your chosen printer.



4. **Optional:** to further format or customize printed output click *Page Settings* and adjust settings. When finished click *OK* and print another test page to view changes.



Generally you need to set all the margins to 0 and headers and footers to Blank.

Advanced Settings. If you followed the steps above and still cannot print there are two alternate print strategies:

- DOS LPTI Print (sends unformatted text directly to the parallel port)
- Custom/External Print (configuration required)

In most cases changing the *Advanced Settings* is a last resort if the *Default print stragety (Mozilla Print)* does not work. Please contact Sitka support if you need help with these settings.

Evergreen cannot print using the Windows *Generic/Text Only* driver. If this driver is the only one available try one of the alternate print strategies instead.

Set Search Preferences

You may set up a default search library and preferred library for a workstation. These settings will override the same settings in the login account. You may also select a default search method for *Advanced Search*.

1. Go to *Admin* → *Workstation Administration* → *Set Search Preferences*.
2. Read the description carefully. Use the down-pointed arrow to list the options. Click your choice and *Save*.

Search Library can be easily overridden on search screens by using the dropdown list in *Search Library* box. Preferred Library can only be chosen in either Workstation Administration or Account Preference. Settings in Workstation Administration take precedence.

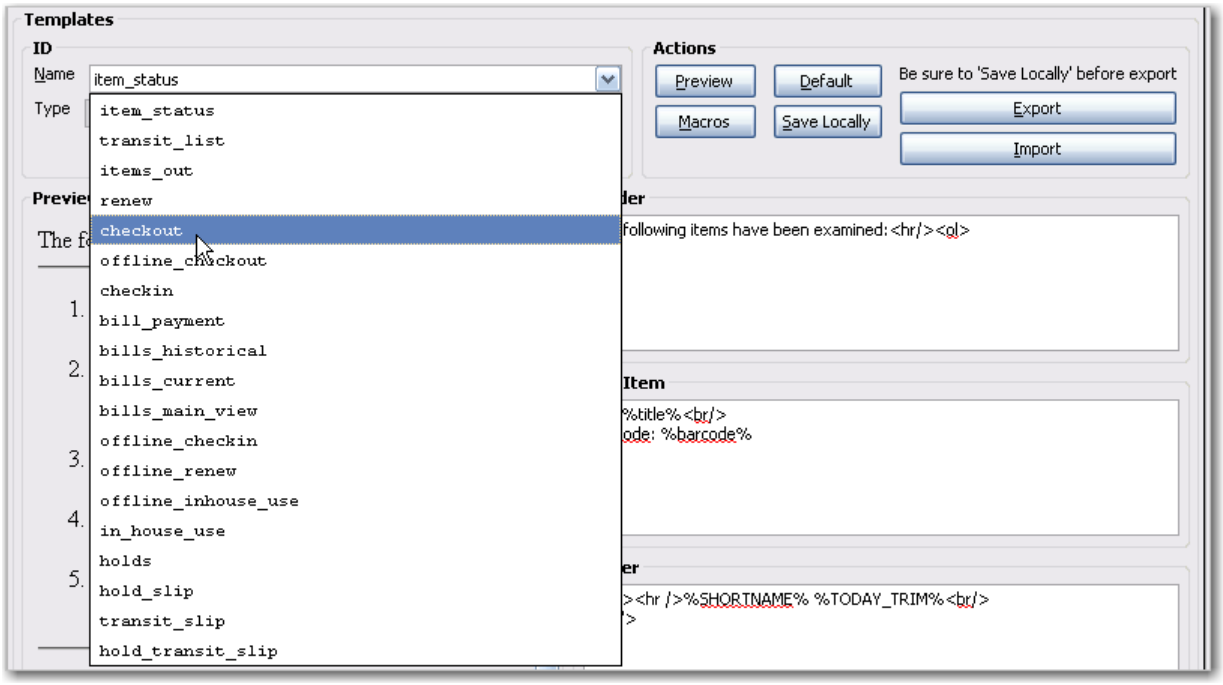
5.7.1. Configure Receipt Templates

There are many default receipt templates included with the Evergreen staff client. These templates are saved on individual workstations. Customization can be done workstation by workstation or by exporting the templates to import to other workstations.

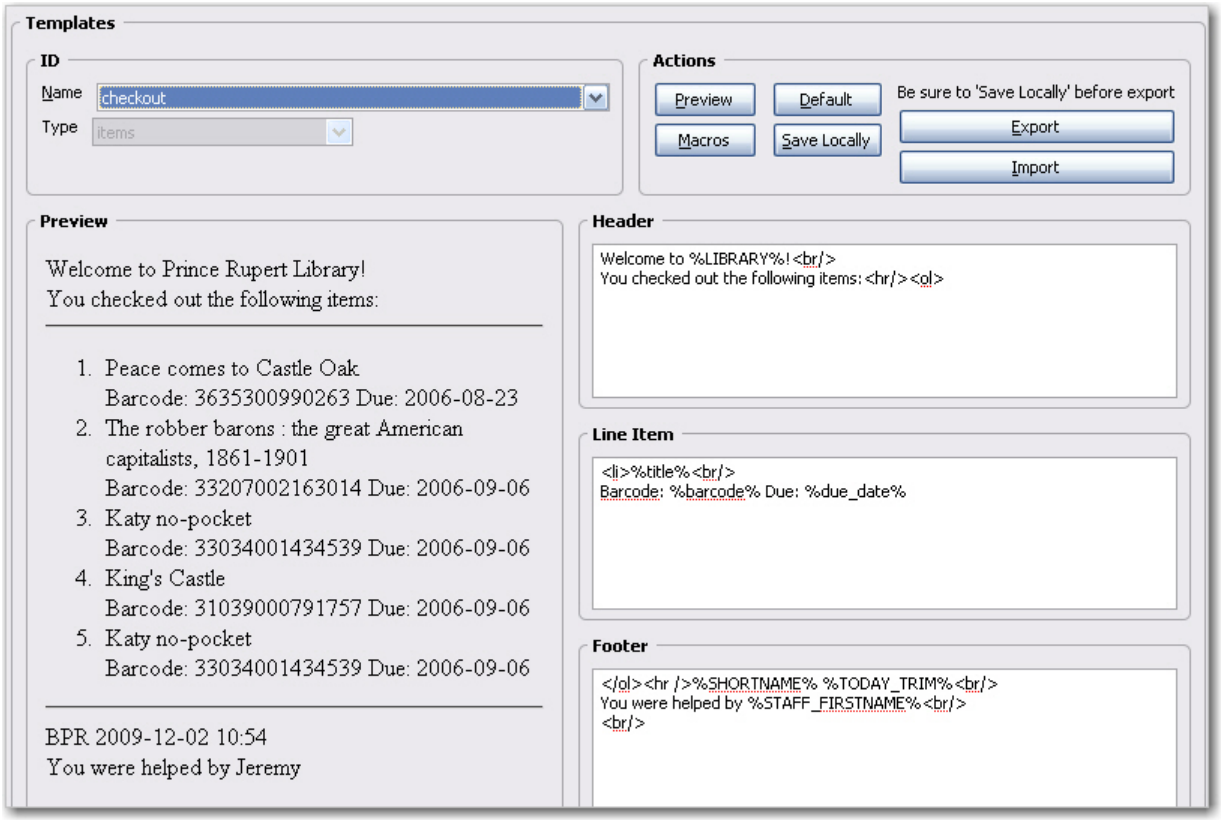
The follwing example will walk you through how to customize the receipt that is printed on Checkout.

1. Select *Admin* → *Workstation Administration* → *Receipt Template Editor*.

2. Select the *checkout* template from the dropdown menu.



3. This is what the default checkout template looks like. The template preview is on the left hand side. You can edit the *Header*, *Line Item* or *Footer* on the right hand side.



4. In the upper right hand corner you can see the available macros by clicking on the *Macros* button. A macro prints a real value from the database. In this example, the macro %LIBRARY% prints “Prince Rupert Library”. The macros that are available vary slightly between types of receipt templates (i.e. bills, holds, items).

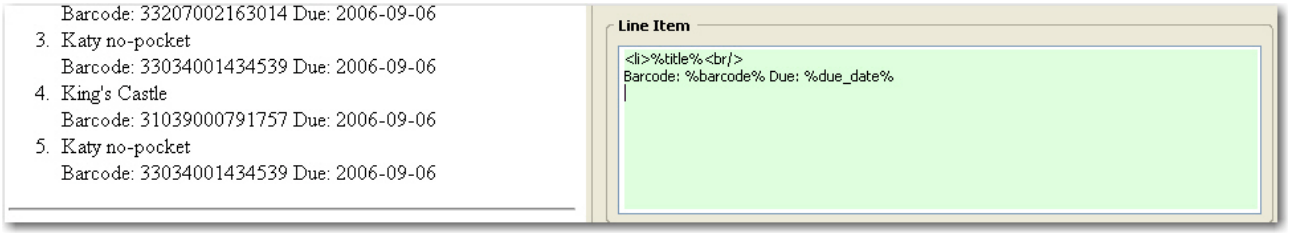
Receipt templates are marked up with HTML tags. You may use most HTML tags. See http://www.w3schools.com/html/ for more information on HTML tags.

You may insert a link to an image, e.g. your library's logo, that exists on the web. For example, to inlcude Sitka's logo, enter tag `<img src=http://catalogue.bclibraries.ca//opac/skin/default/images/sitka.png>`. in the receipt template. The URL is where Sitka's logo is kept on the Web.

There are several macros that can carry pre-built contents specific to individual libraries. The contents can be set up in local administration. For details see Library Settings. Though text can be hard-coded in receipt templates, the pre-built contents will be automatically applied to receipts printed from all workstations without editing each template.

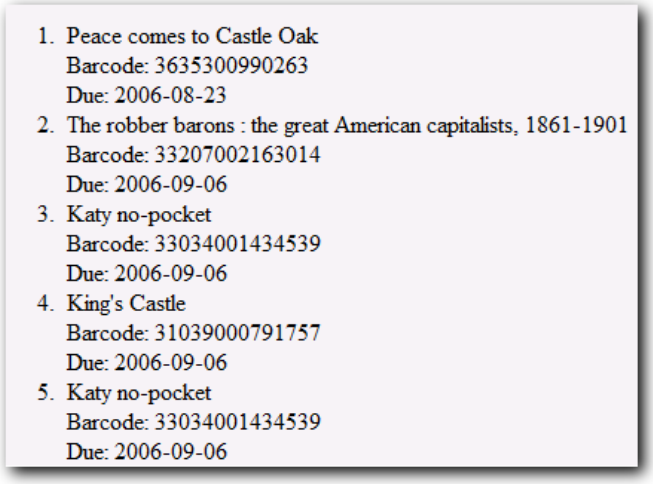
- %INCLUDE(notice_text)%
- %INCLUDE(alert_text)%
- %INCLUDE(event_text)%
- %INCLUDE(footer_text)%%
- %INCLUDE(header_text)%

5. Below are some example edits:



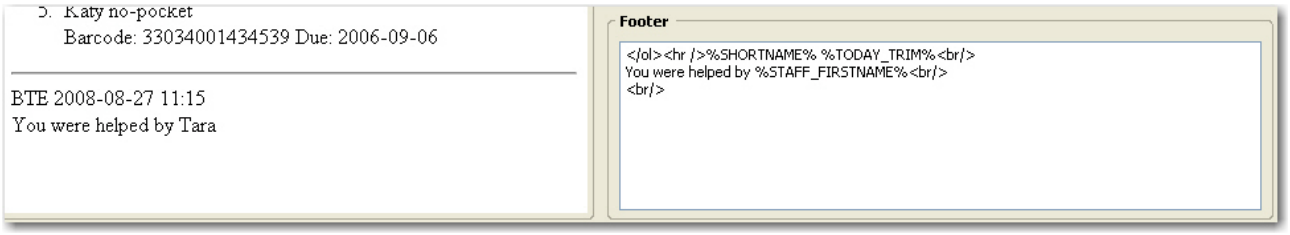
The above is the default *Line Item* in Checkout template. The macro %barcode% prints the item barcodes of the books that were checked out. The macro %due_date% prints the due date for each item that was checked out. You may add a line break between them: Barcode: %barcode% </br> Due: %due_date%

The receipt preview will look like this:


1. Peace comes to Castle Oak
   Barcode: 3635300990263
   Due: 2006-08-23
2. The robber barons : the great American capitalists, 1861-1901
   Barcode: 33207002163014
   Due: 2006-09-06
3. Katy no-pocket
   Barcode: 33034001434539
   Due: 2006-09-06
4. King's Castle
   Barcode: 31039000791757
   Due: 2006-09-06
5. Katy no-pocket
   Barcode: 33034001434539
   Due: 2006-09-06

The due date can only be printed in the YYYY-MM-DD format.

This is what the default *Footer* looks like:



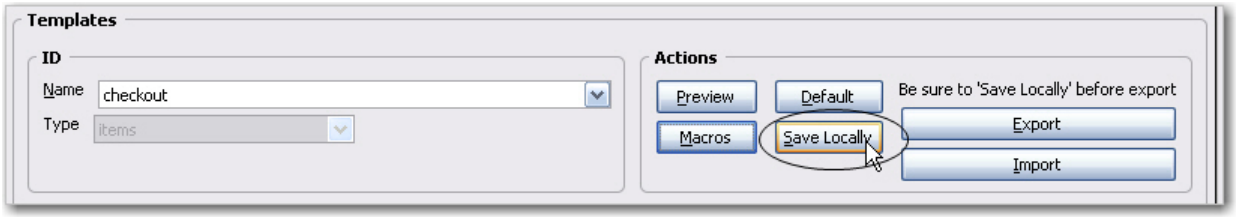
Remove the “You were helped by %STAFF_FIRSTNAME%
”. As many libraries use a generic circulation login on the circulation desk, the “You were helped by…” note isn’t meaningful.

Add “Renew your items online at http://terrace.catalogue.bclibrary.ca or phone the library at (250) 638-8177” to inform your patrons how to renew their items.

5. Katy no-pocket
Barcode: 33034001434539 Due: 2006-09-06
BTE 2008-08-27 11:21
Renew your items online at http://terrace.catalogue.bclibrary.ca or phone the library at (250) 638-8177
Footer
<hr />%SHORTNAME% %TODAY_TRIM%

Renew your items online at http://terrace.catalogue.bclibrary.ca or phone the library at (250) 638-8177.

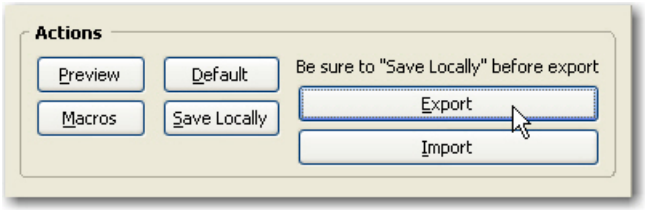
6. Once you have the checkout template how you want it, click *Save Locally* to save the template to your computer.



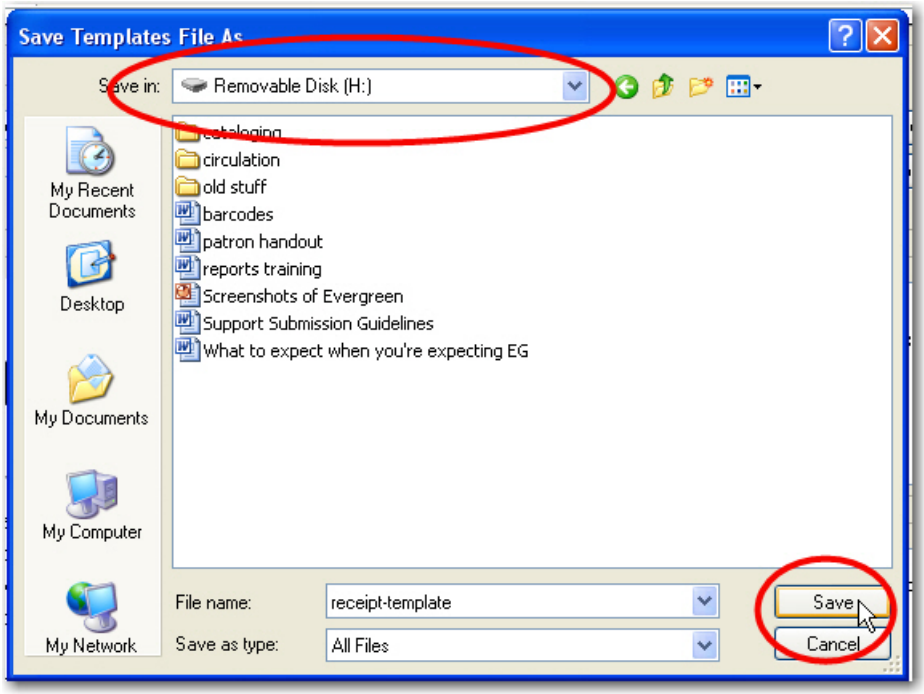
Exporting templates

As you can only save a template on to the computer you are working on you will need to export the template if you have more than one computer that prints out receipts (e.g. more than one computers on the circulation desk, or another computer in the workroom that you use to checkin items or capture holds with).

1. Click on *Export*.



2. Select the location to save the template to, name the template, and click *Save*.

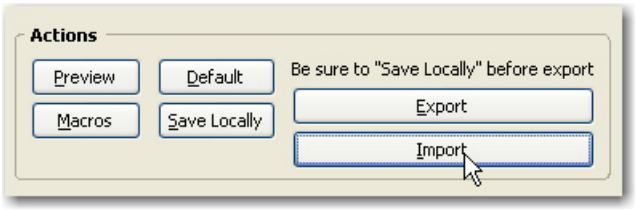


3. Click *OK to confirm*.

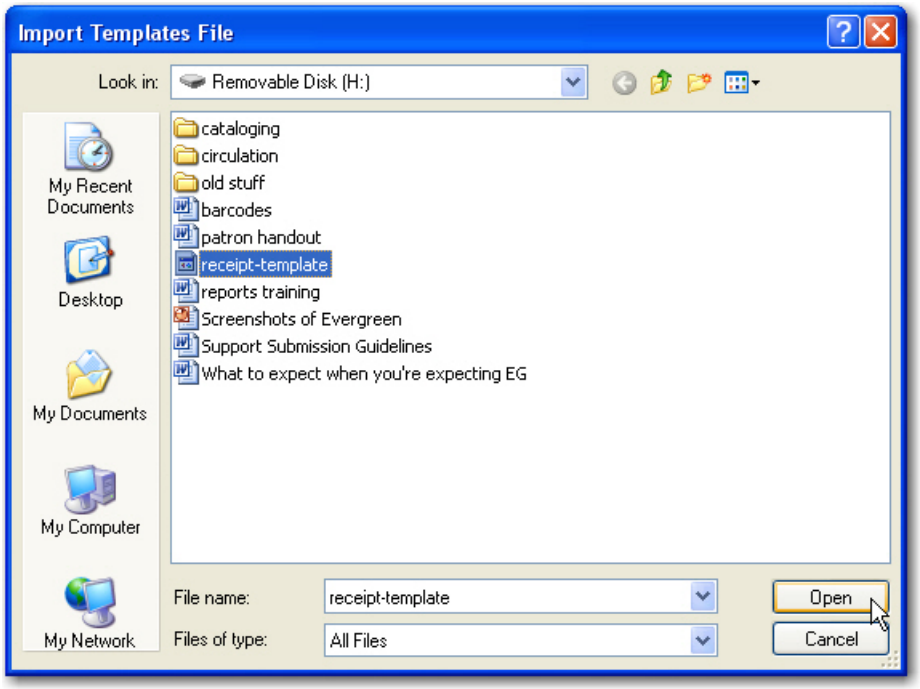
Importing Templates

1. Send the exported templates file to the workstation to which you want to import the templates. You may do it using memory stick or email, etc.

2. On Receipt Template Editor, Click *Import*.

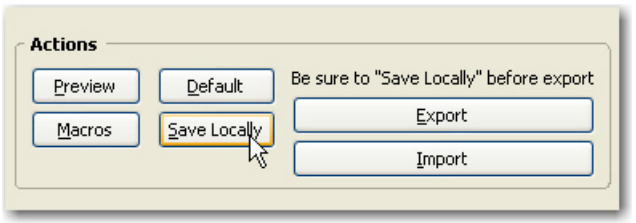


3. Navigate to and select the template file that you want to import. Click *Open*.



4. Click *OK* to confirm on the prompt.

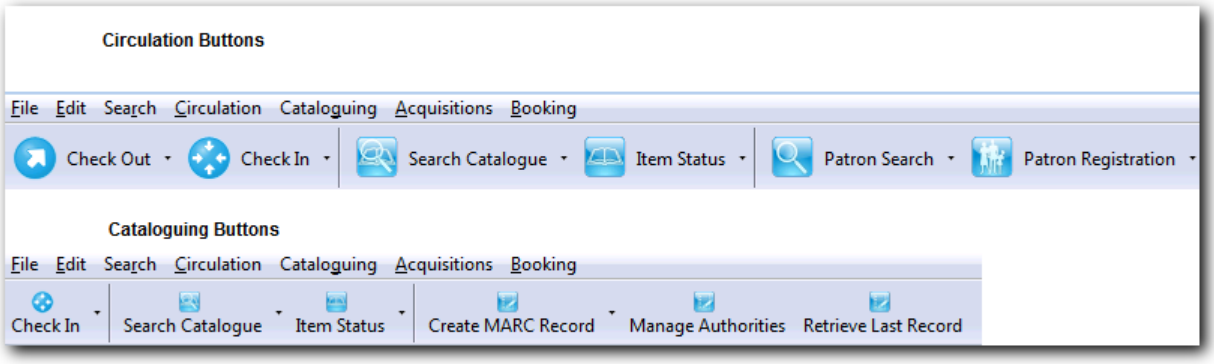
5. Click *Save Locally*.



By default all libraries use shared and hard-coded templates for Hold Slip and Transit Slip. Libraries can switch to using their own templates by setting up a library setting: *Use legacy hardcoded receipts/slips*. Details see Library Settings.

Button Bar/Toolbar

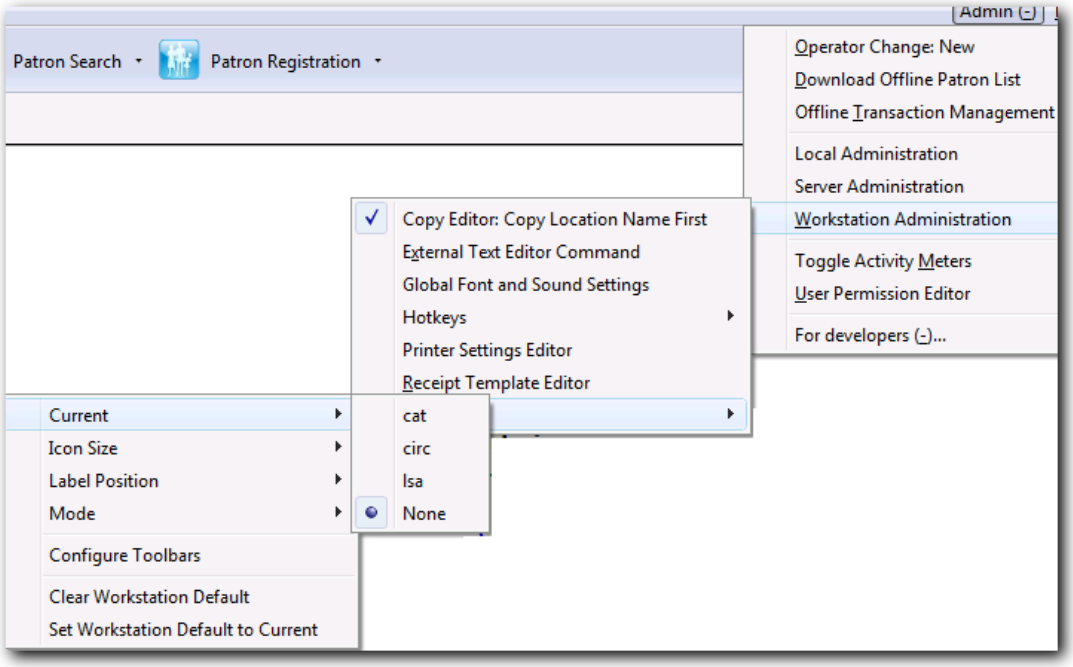
There is an optional toolbar with buttons providing quick access to commonly used staff client functions. When activated the toolbar appears below the menu bar.



The look of the buttons can be customized. Use *Mode*, *Label Position* and *Icon Size* on the *Toolbar* menu shown on the screen below to select your preference.

A group of buttons can be selected or activated by default for all workstations at a particular library (see Library Settings for details). A different default group can be set up on individual workstations by the following steps.

1. Go to *Admin* → *Workstation Administration* → *Toolbars* → *Current*.



2. Choose a group from the list.

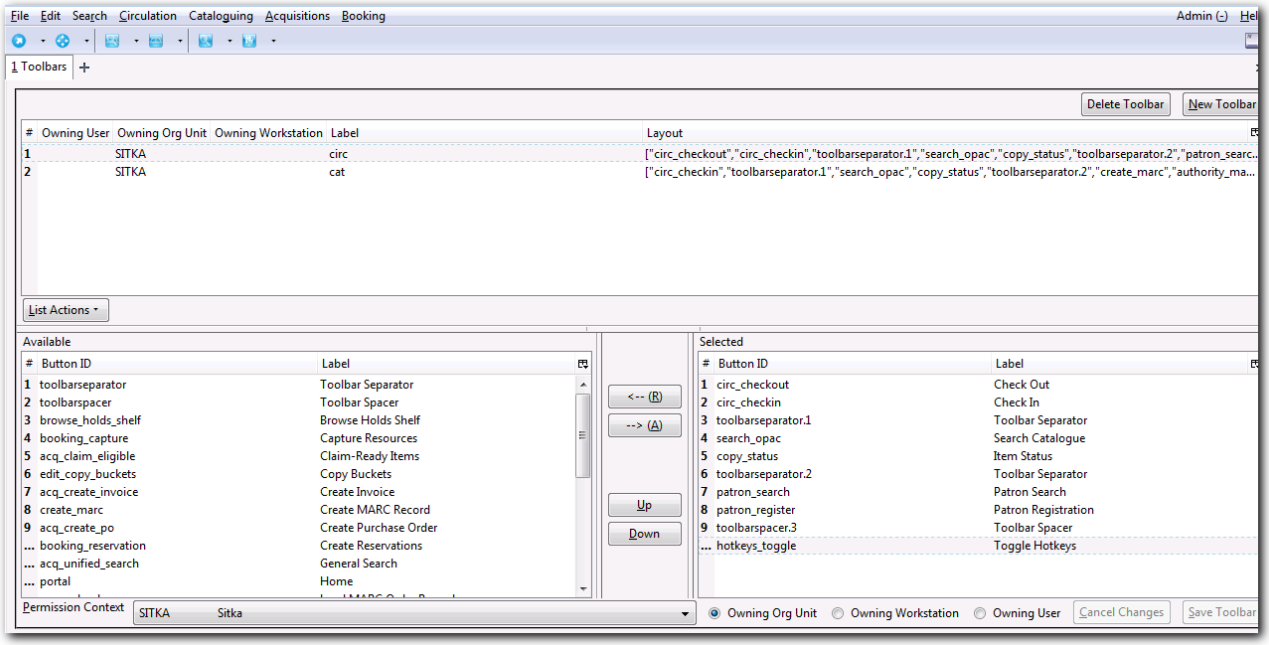
3. Go back to the above menu. Select *Set Workstation Default to Current*. The above selected toolbar group is set as default for this workstation.

   To clear an existing setting click *Clear Workstation Default*.

Circulation and Cataloguing are the default toolbar groups. Local system administrators can create new groups for individual accounts, workstations or all in a particular library.

1. Go to *Admin* → *Workstation Administration* → *Toolbars* → *Configure Toolbars*.

2. Click *New Toolbar*



3. In the prompt window type in a name for the new group, and then click *OK*.

4. Choose the function buttons you want to add to the new group. Click *-->(A)* to add. You may select one in the *Selected* pane, and then click *<--(R)* to remove it.

5. Check one of the radio buttons: *Owning Org Unit*, *Owning Workstation*, or *Owning User* to specify that the new group should be available to every workstation in your library, or this workstation, or yourself only.

6. If you chose *Owning Workstation* in the above step, click the down-pointed arrow at the end of the *Permission Context* box to select your library in the organizational unit tree.

7. Click *Save Toolbar*.

8. The new toolbar group will be displayed together with Circulation and Cataloguing groups when you choose a toolbar group next time.

Part II. Circulation

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Chapter 6. Patron Records

6.1. Searching Patrons

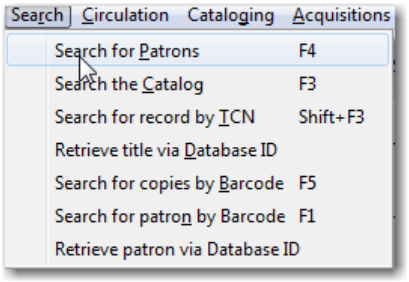
There are two ways to retrieve patron records in Evergreen:

- ***Search → Search for Patrons (F4) .*** Search by patron name, email address, phone number, OPAC login, identification (primary and parent/guardian), etc. You can also filter by patron permission profile. Searches can be scoped to your library, federation, or to all of Sitka, but patrons from other Sitka libraries are only listed if they have used their card at your library and have agreed to share their personal information.

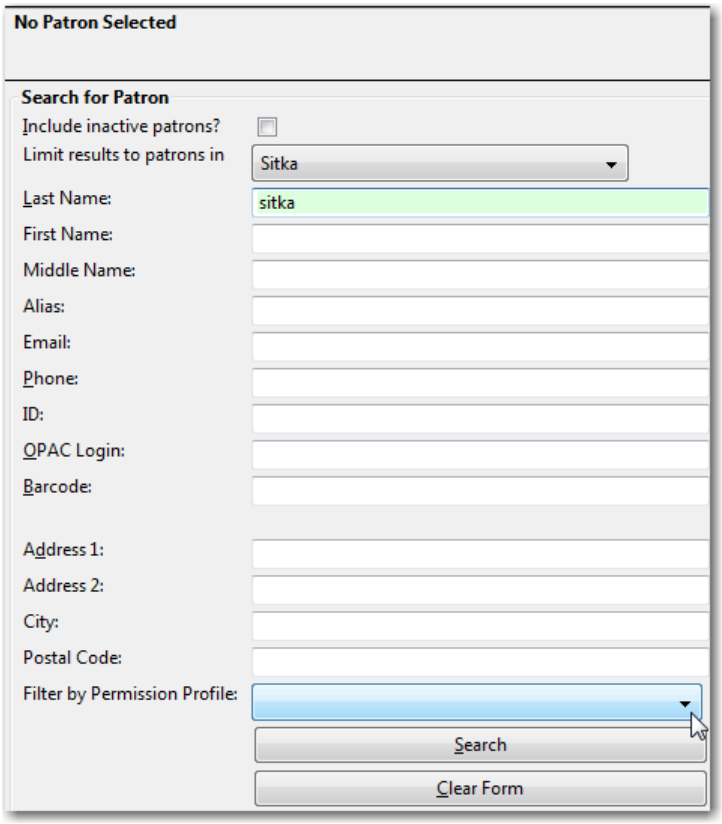
- ***Search → Search for patron by Barcode (F1) .*** This is the recommended method if you have the patron's barcode: it is faster and can retrieve accounts from any Sitka library. Patrons from other Sitka libraries visiting your library for the first time must consent to sharing their personal information before the account can be used.

The following example demonstrates how to retrieve a patron account if you do not have the barcode.

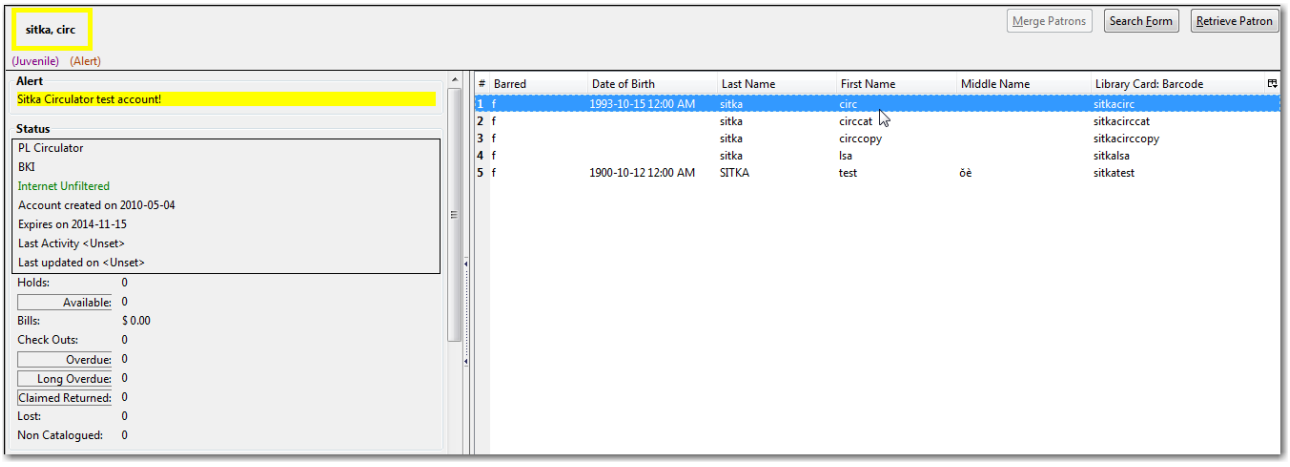
1. To find patrons, press **F4** in an active tab or on the top menubar select *Search → Search for Patrons*, or simply click *Patron Search* button on the button bar. You must have the Circulation Toolbar activated for the Patron Search button to be present.



2. Enter search criteria, such as last name, first name, phone number, etc., and select *Filter by Permission Profile* from drop down menu if desired, and click *Search* or press **Enter** on your keyboard.



3. Search results will be listed on the right column of the screen. You can select a record to view record summary on the left (or top) of the screen. Double click on the selected patron, or click the *Retrieve Patron* button on the right top corner to load the patron record.

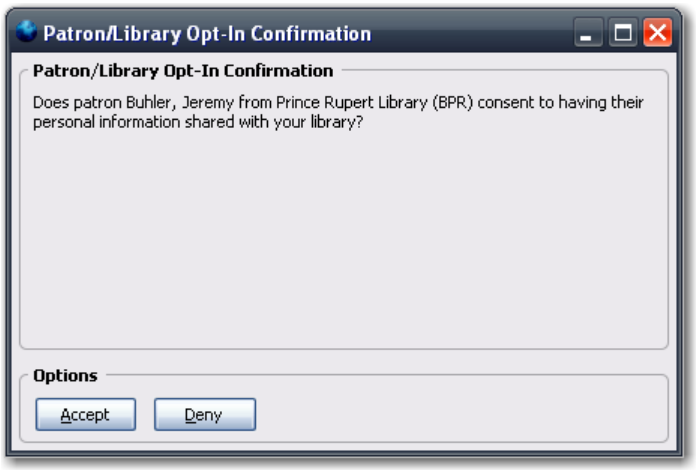


You can use only one search field or combine as many as all search fields.

You can truncate search terms for more results.

Selecting *Include inactive patrons* checkbox searches both active and inactive patrons. (Being active/inactive is controlled by the *Active* checkbox in the patron record).

Patrons from other Sitka libraries (not a branch of your library system) have to present their Sitka library card for their first visit. Their records can only be found by *Search → Search for patron by barcode F1*. They need to give consent to your library to access their records. You will be prompted to "opt-in" the patron after scanning such a card. After opting-in, these patron records are searchable on the *Patron Search F4* screen.


Patron/Library Opt-In Confirmation
Patron/Library Opt-In Confirmation
Does patron Buhler, Jeremy from Prince Rupert Library (BPR) consent to having their personal information shared with your library?
Options
Accept
Deny

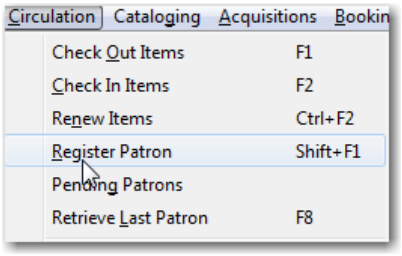
The default search scope on *Search → Search for patron by barcode F1* is the whole Sitka database. On *Search → Search for patron F4* it is your library's patrons and the patrons who have opted in to your library. The *Limit results to patrons in* function takes effect on your library's patrons and opted-in patrons only. Non-opted-in patrons are not searchable on F4, even by barcode.

6.2. Registering New Patrons

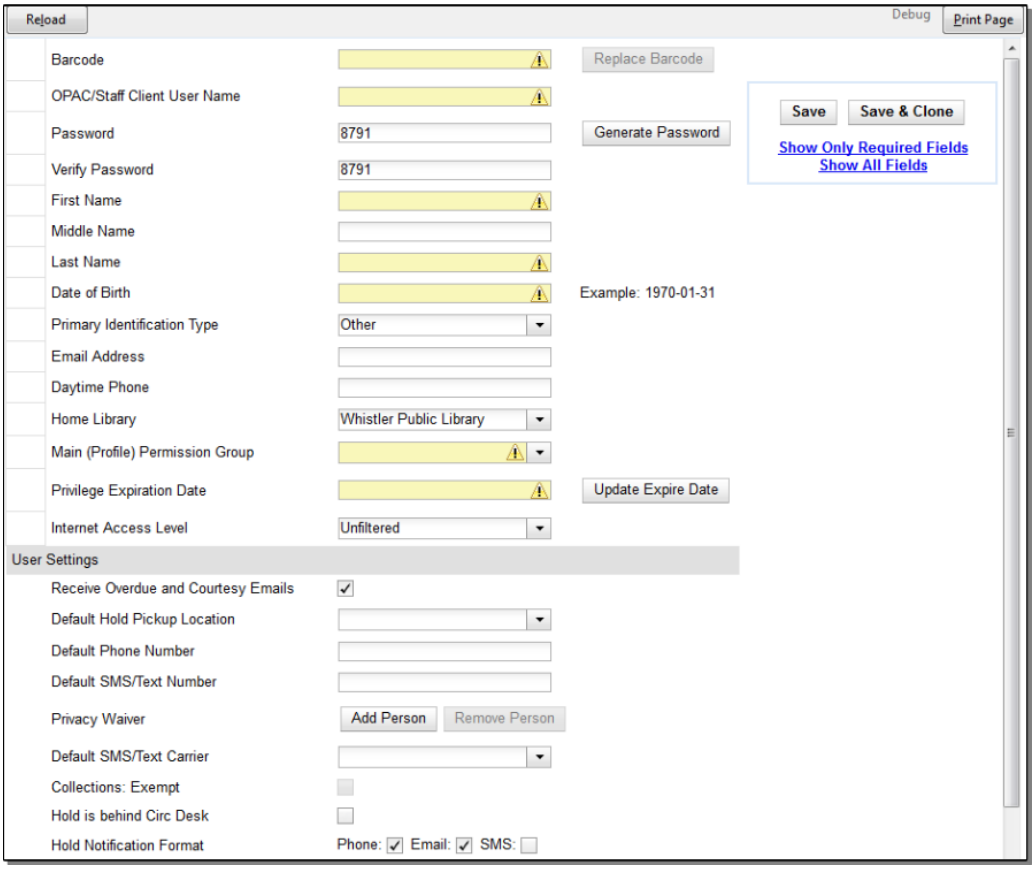
Before registering a new patron, you need to do a thorough search to make sure he/she does not already have a record in Sitka Evergreen. It is good practice to ask the patron if they have a library card from another library in BC or MB and scan that card. Patrons may be unaware that they are part of a consortium and their current library card will work at your library. If modification is required, you should modify the existing patron's record instead of creating a new one. See Sitka policy about how to manage new and existing patron BC or MB library cards in Evergreen.

Always use *Search → Search for patron by Barcode* for the thorough search if the patron has a library card. Using barcode as a search term on the patron search screen F4 is different from using *Search → Search for patron by barcode F1*. It does not search those patrons who have not opted-in to your library.

1. Press **Shift**+**F1** or select *Circulation* → *Register Patron* or click *Patron Registration* button on circulation toolbar.



2. Fill in required information. This screen can look different depending on your library's choices regarding required and suggested fields and whether or not you are displaying all fields, required fields, or suggested fields.



3. When complete click *Save* at the right top corner of the screen.

It is good practice to give patrons a piece of paper providing your OPAC's URL, the patron's username, which by default is their barcode number, and the system generated password or the last four-digit of his/her phone number depending on your library's policy. Patrons can login to their account on the OPAC with their user name and password. They are encouraged to change their password. The new password must be in a format with more security features (at least 7-digit long combining numbers and letters). Both username and password are case-sensitive. Patrons can also change their username to something easier to remember (case-sensitive) in the *My Account* option in the OPAC.

Tips for registering patrons:

All fields with a yellow backgroud and exclamation mark are mandatory.

Show Only Required Fields button limits the display to the above mandatory fields and fields with a default value. If your library policy specifies other required fields, this button will not retain them. You are recommended not to use this button when registering a patron.

Blank mandatory fields and fields with a value in the wrong format may result in a "Form is invalid" error when saving the record.

For libraries using phone number as patron's password, once the Day Phone field is filled, the last 4 digits of the phone number will be automatically copied over to password fields to replace the random number.

Enter the patron’s middle name into the record if you can. This will help distinguish among patrons as the database grows.

Juvenile flag: Each library can determine an age threshold of juvenile patrons. If the date of birth in a patron's record falls in the juvenile category, the *Juvenile* checkbox is automatically selected. If your library does not record patron's date of birth, you may manually select *Juvenile* checkbox. It is optional.

Email Address: If required, mulitple email addresses can be put in, separated with comma or semicolon.

OPAC/Staff Client Holds Alias is used to replace the patron's name on the hold slip.

The *Receive Overdue and Courtesy Emails* checkbox allows patrons to opt-out of receiving courtesy and overdue email notifications. If this box is un-checked patrons will not be emailed courtesy and overdue notifications. Patrons are able to set this themselves as well through My Account.

The *Hold is behind Circ Desk* checkbox is used to identify those patrons who request to pick up holds at the circulation desk when your library's holds are kept in a public area. It works together with the library setting: *Hold: Behind Desk Pickup* , which can be set up by local system administrators. See Chapter 48, *Local Administration Menu*.

If a valid postal code is given, the city, province and country information will be automatically retrieved.

Based on your library's policy, patron address may not be mandatory. If you do not want to record the address, you need to delete the field by clicking the red cross sign beside *Address*. A Blank *Address* field will result in an error when attempting to save the record.

The consortium decides the shared list of profile groups (patron profiles), but individual libraries can choose to use only a subset of the available options.

There is no link between patron profile group and the *Juvenile* checkbox. If your library uses the *Juvenile* checkbox, you need to deselect it when moving a patron from the juvenile profile group to the adult profile group.

There is a default *Account expiration date* of 3 years for all profile groups except PL New User which has an expiration of 3 months. It shows up once a profile group is selected. You can always change it using the calendar widget or typing a date.

If your library does not control Internet access via patron accounts, you need not change the default value in *Internet Access Level*.

Always keep *Is Group Lead Account* unchecked.

Statistical categories are usually used to further group patrons by categories not in the profile groups. Individual libraries can create their own patron statistical categories. There are also consortium-wide and federation-

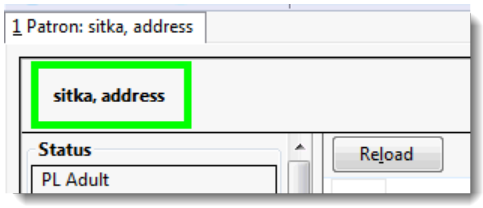
specific categories. See Chapter 48, *Local Administration Menu* for more information about creating statistical categories.

Clicking the *Save and Clone* button will save the patron record and open a new patron record. Phone numbers from the previous record will be copied into the new record. Depending on your library's setting (See Chapter 48, *Local Administration Menu* addresses may be copied over from or linked to the previous record. If your library chooses to link the addresses, the addresses shown in the new record is greyed out and they can only be edited in the original record. However, the linked addresses can be replaced by new ones. Using the *New Address* button you can create a new address and mark it as both the *Mailing* and *Billing* address. Once the record is saved, the linked addresses will be replaced. The address' owning account can not be deleted or merged when other accounts are stil using the address. Records created by cloning are automatically grouped together.

Staff accounts can be used as patron accounts, in terms of circulation. Only Local System Administrators can edit staff accounts.

6.3. Account Status by Colour Code

Patron accounts are displayed with a coloured frame around the patron's name. The frame colour conveys information about the current status of the patron account. Patrons who have no outstanding fines, overdue items, or alert messages appear with a green frame:



Here are the possible background colours:

1. Green - everything in order (no overdues, no fines, not expired, etc.)
2. Orange - fines or overdue items, but not exceeding maximum limits
3. Purple - patron exceeds one or more of maximum fines, check out, or overdue limits defined in Group Penalty Thresholds
4. SITKA, test middle - there is an alert message under *Message* button. on the account
5. Yellow - there is an alert in body of patron record. on the account
6. Dark grey - account is inactive

7. Light grey - account is expired

8. Red - patron is barred

In the above list the colours with higher numbers take precedence. For example, a patron with a single overdue item would be orange, unless they also had an alert message which would make them yellow. A barred patron with overdue items and an expired account would be red.

6.4. Updating Patron Records

Updating Patron Information

Renewing Library Cards

Marking Library Cards Lost

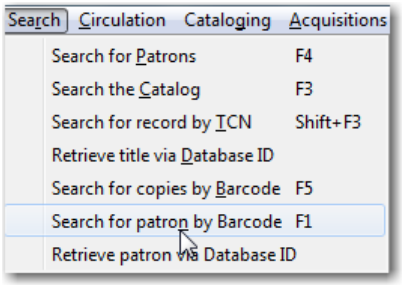
Resetting a Patron's Password

Barring a Patron

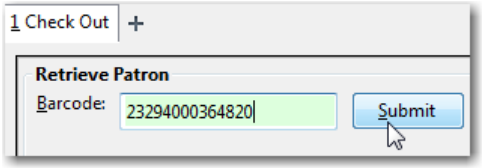
There are some tasks you need to do in your daily operation with the patron records, e.g. updating patron's contact information, renewing an expired library card, marking a library card lost, resetting patron's password, barring a patron, inserting a note or alert message, etc.

6.4.1. Updating Patron Information

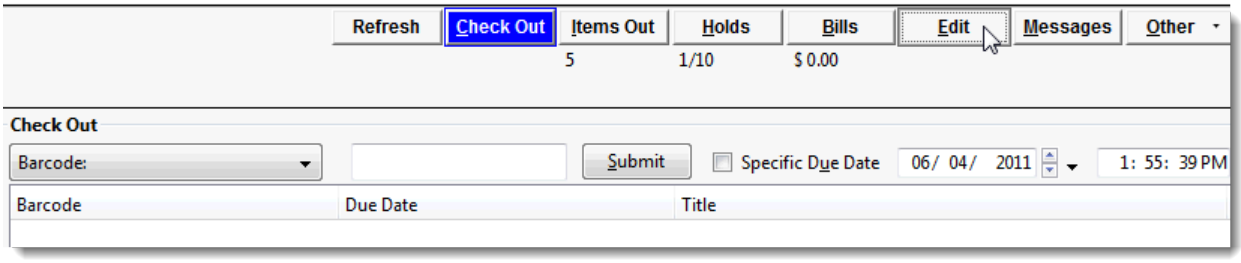
1. Retrieve a patron record. Here we use *Search* → *Search for patron by barcode* or **F1**.



2. Scan the barcode, or type barcode and click *Submit*.



3. Once the patron record is loaded, *Check Out* is the default screen. Your library may choose to display the Bills screen first if the patron has bills. See Chapter 48, *Local Administration Menu*. Click *Edit* to retrieve patron information.

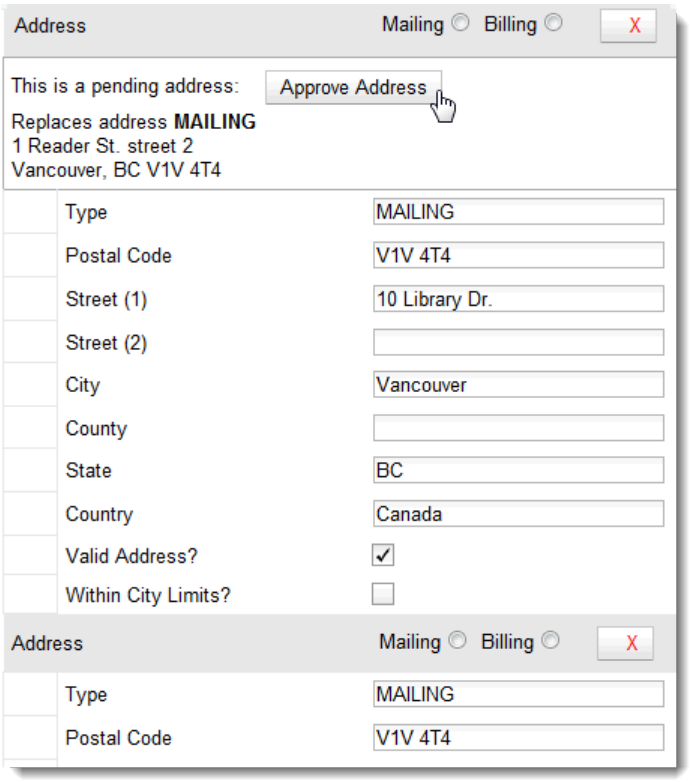


4. Edit required fields.

5. Once editing is done, click the *Save* button at the right top corner.

Required Survey questions, if any, need to be answered every time when saving the patron record.

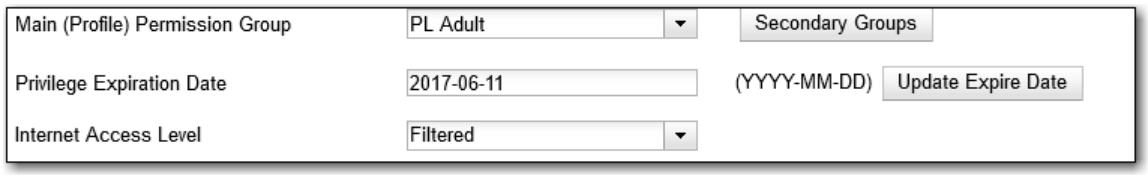
Patrons may edit their address on OPAC if your library allows it in the Library Settings Editor. Such addresses will be displayed on top of the existing address in patron record for staff to approve.



To approve it, click *Approve Address*. It will replace the existing address.

6.4.2. Renewing Library Cards

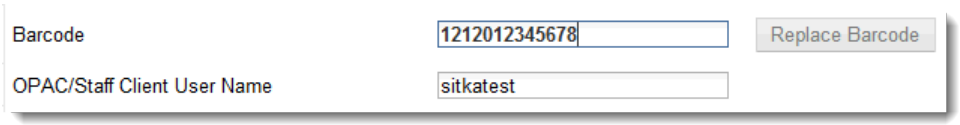
Follow the steps above to retrieve the patron record and update the expiration date in the patron's record. You can use the calendar widget, which shows up automatically once clicking in the field, or simply click the *Update Expire Date* button. Clicking the *Update Expire Date* button will re-calculate the user's expire date to 3 years from today's date. Once done, click *Save* button at the right top corner.



6.4.3. Marking Library Cards Lost

1. Follow the steps above to retrieve the patron record. Click *Replace Barcode* beside *Barcode*.

2. Scan or type a new barcode in the blank field.



3. Save the changes by clicking *Save* button at the top right corner.

If the username is still the original barcode, it should be replaced with the new barcode number.

Once a library card is marked lost, Evergreen marks the card inactive and keeps it in the database.

If the patron has lost a library card before, the *See All* button shows up beside the *Replace Barcode*. Click it. All barcodes that the patron has had are displayed in a pop-up window. Staff can now reactivate an inactive card, by de-selecting Active for current card, and selecting Active for card they wish to activate. Staff can also assign the active barcode as the primary card, and these two edits should be done in tandem; the Active card has to be the Primary Card. Click *Apply*, and *Save*.

6.4.4. Resetting a Patron's Password

Follow the steps above to retrieve the patron record. Click *Reset Password* button or type in a new password in *Password* and *Verify Password* fields. Save the record.

Existing password is not displayed in patron records for security reasons.

If your library uses the last 4 digits of phone number as the default password (Patron: Password from phone # is set to *True* on Library Settings Editor), please do not use Reset Password button. Instead type in the phone number, then save the record. Clicking the Reset Password button will generate a random number.

You can only reset passwords for accounts with less permissions than your account. For example, if your account is PL Circ + Full Cat you can reset a password for PL Circulator but you cannot reset a password for PL Local System Administrator.

6.4.5. Invalidate Email Address or Phone Number

Invalidating patron emails ensures that Evergreen does not continue to attempt to send emails to an invalid email address. Accumulated bounced back emails may result in emails from Evergreen (such as overdue and pre-due notices) being blocked by some email service providers (GMail, Hotmail, etc). It may affect all Sitka Evergreen users.

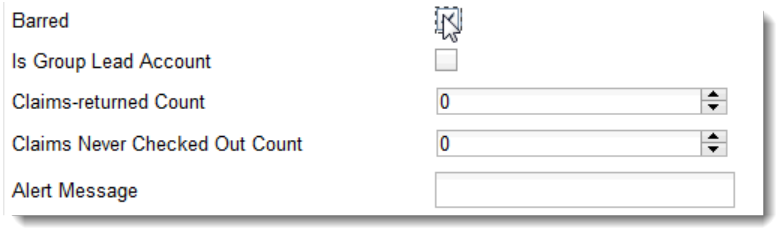
Libraries should regularly check the bounced-back emails and invalidate the email addresses accordingly to ensure smooth notification services from Evergreen.

1. Open the patron's record.
2. Click "Edit".
3. Beside the patron's email address click the "Invalidate" button. (This button will only appear if the email field is filled.)
4. Click "Save".
5. Click "Refresh".
6. The patron's email will be cleared from the email field and a message will now appear at the top of the patron's record saying "Invalid Email - see messages". Clicking on this message will take you to the Messages screen.
7. Here you can see the invalid email (can compare it with what the patron says their emails should be) and can delete the the message when it is resolved.

The same procedure can be used to invalidate patron's phone number.

6.4.6. Barring a Patron

Follow the steps above to retrieve the patron record. Select *Barred* checkbox. It is good practice to put a note in the *Alert Message* field to explain why the patron is barred. Save the record.



Barring a patron from one library bars that patron from all consortium member libraries.

To unbar a patron, uncheck the *Barred* checkbox and remove the alert message.

6.5. Patron Alerts, Notes, Messages and Notifications

Alerts

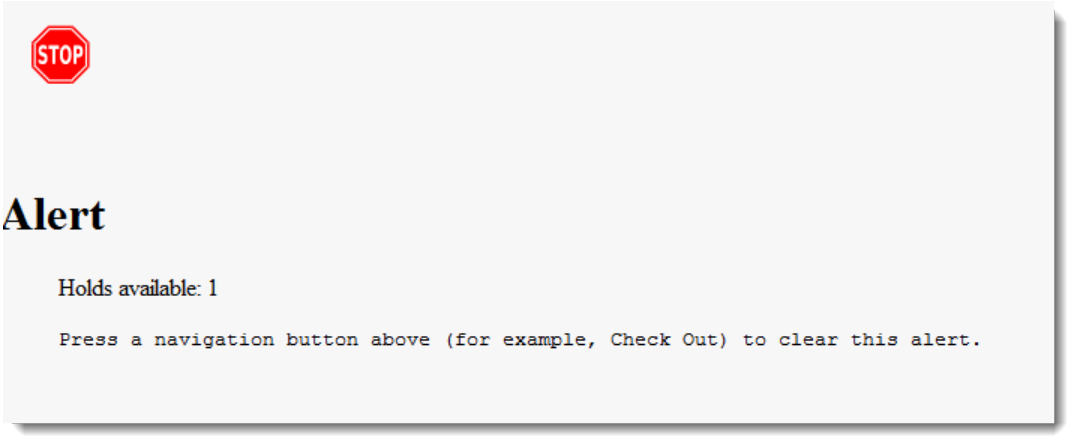
Notes

Messages

Notifications

6.5.1. Alerts

If a patron's record has an alert, a red *Stop* sign is displayed when the record is retrieved.



There are three types of alerts in Evergreen: staff-generated, system-generated and standing penalties.

Staff-generated alerts are created and should subsequently be removed manually by staff.

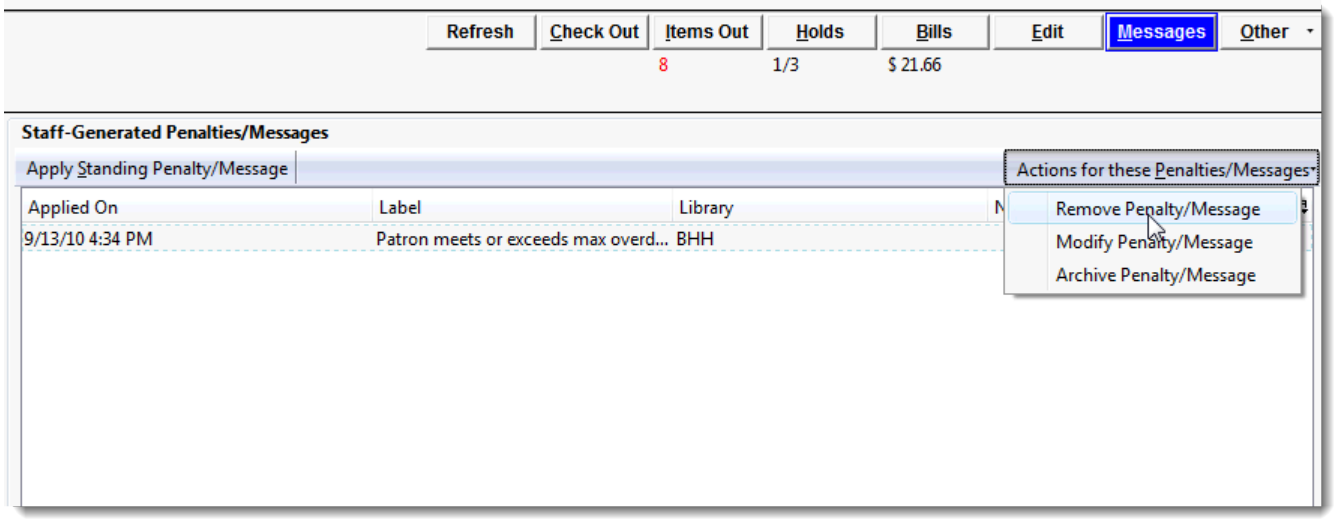
To insert/remove an alert message, retrieve the patron record. Type/delete required message in the *Alert Message* field. Then save the record.

System-generated alerts are automatically inserted on some conditions, such as the patron account is expired, patron has a ready-for-pickup hold, etc. Once the cause is resolved, e.g. patron's account has been renewed or patron has checked out the on-hold item, these messages will disappear automatically.

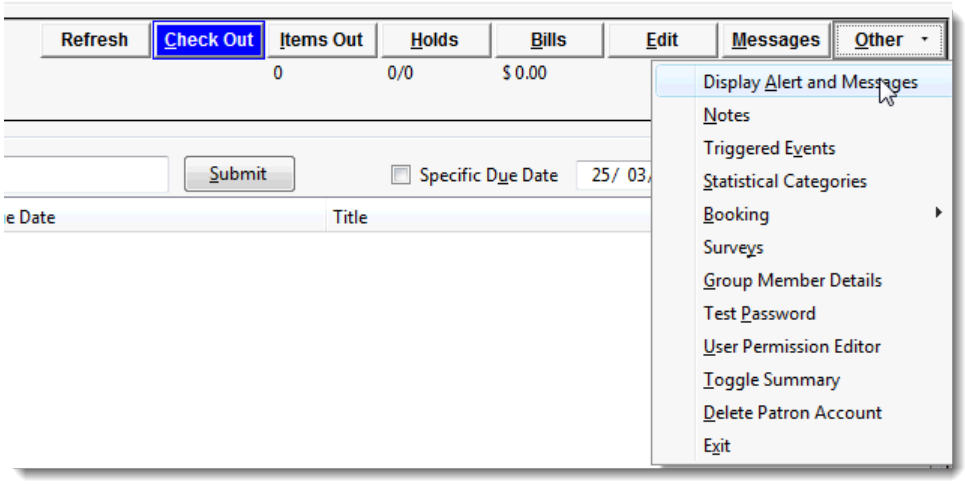
Standing penalties are inserted when a patron's circulation condition meets certain criteria set up by your library, e.g. the maximum fine threshhold, the maximum number of items allowed to be checked out, or the maximum number of overdue items allowed. Standing penalties block some of the patron's circulation activities. For example, if a patron has a standing penalty of exceeding maximum number of overdue items, the patron can not check out more items before returning/renewing the overdue items. If a patron has an exceeding maximum fines penalty, he/she can not check out or renew any item before he/she clears the fines or lowers the amount to below the maximum fines threshold. Standing penalties automatically disappear once the cause is resolved.

Standing penalties can be overriden on an item by item basis. Alternatively, you can remove the standing penalties temporarily to carry out the circulation actions that need to be overriden. If the conditions persist, once you refresh or re-access the patron record the penalties will be re-applied immediately.

To remove standing penalties, go to *Messages*. Highlight the penalties. Click *Actions for these penalties* → *Remove Penalty/Message*.

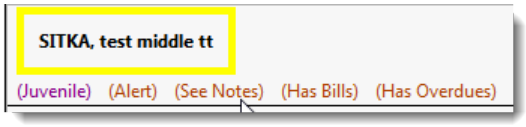


Besides the alert screen, alerts can be viewed by going to the dropdown menu *Other* → *Display Alerts and Messages*

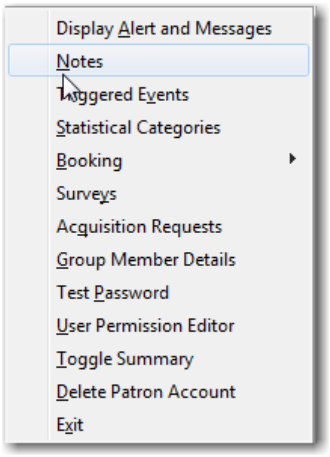


6.5.2. Notes

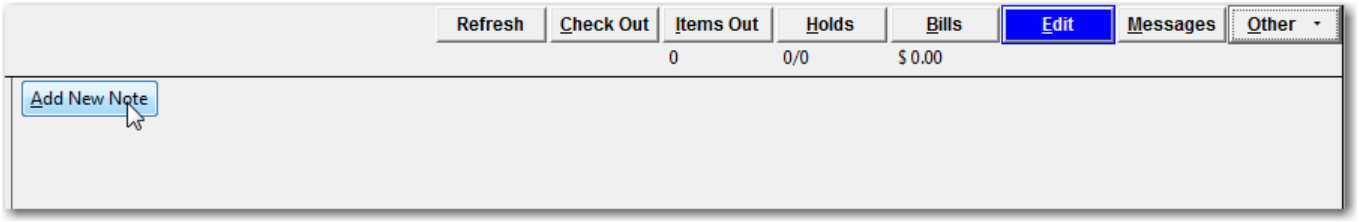
If there is a note in a patron's record, a *See Notes* message appears underneath the patron's name when the record is retrieved. Notes are strictly communicative and in the Evergreen Staff Client are only visible from within the *Notes* field. Notes can be made visible to the patron, via their account on the OPAC.



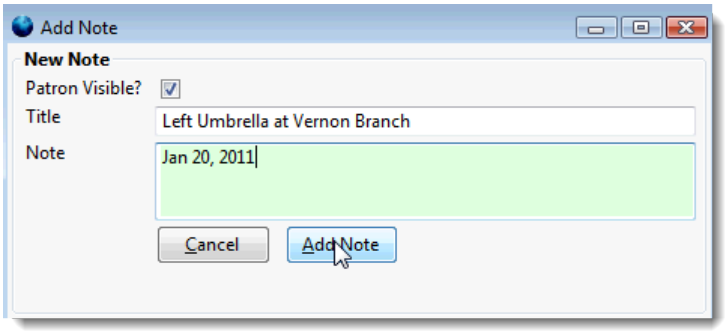
1. To insert/remove a note, retrieve patron account and click *Other* → *Notes*.



2. Click *Add New Note.*



3. Enter note information and click *Add Note*. In this example, *Patron Visible* is selected. Click *OK* at confirmation prompt.

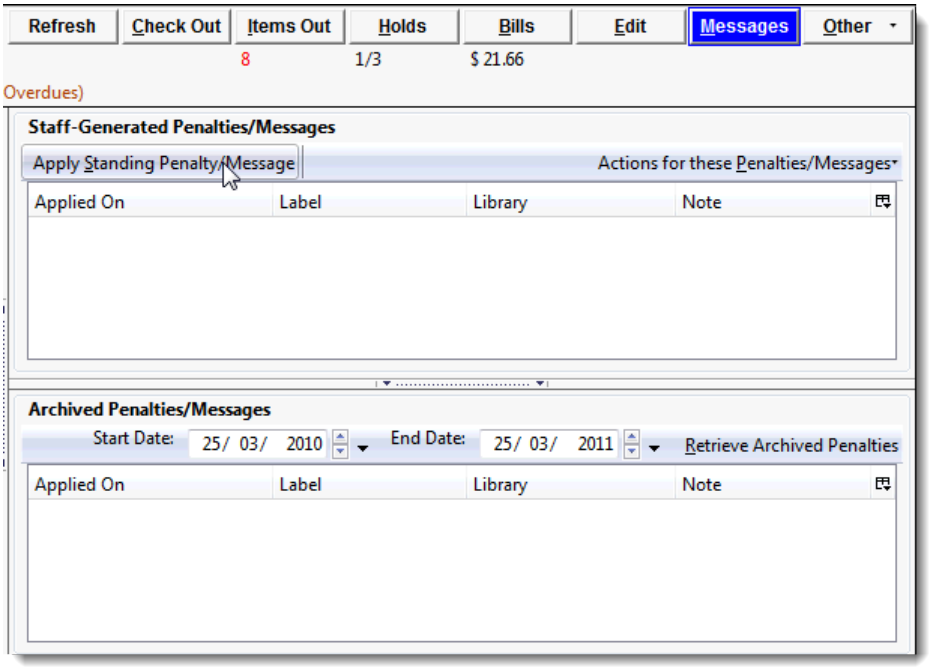


4. To delete a note, go to *Other* → *Notes*, use the *Delete This Note* button under each note.

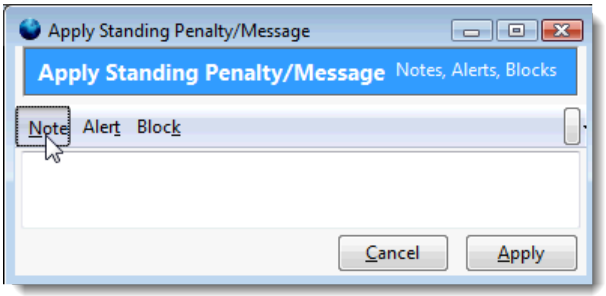
6.5.3. Messages

Staff can also add Note, Alert and Block on *Messages* screen.

1. Retrieve patron record. Click *Messages*.
2. Click *Apply Standing Penalty/Messages*.

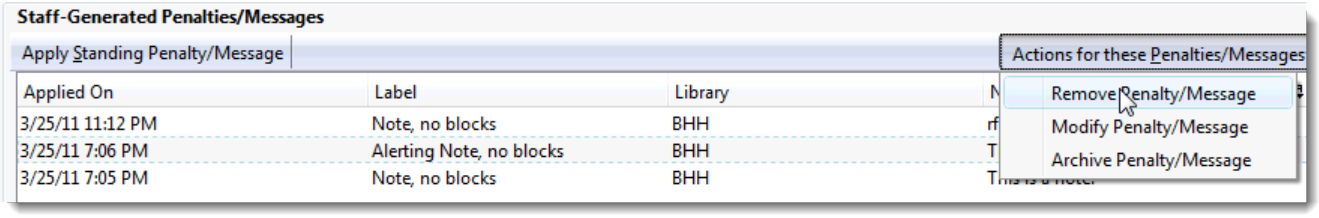


3. In the pop-up window, select *Note*, *Alert* or *Block*. Then type the message in the box below.



4. Click *Apply* button.

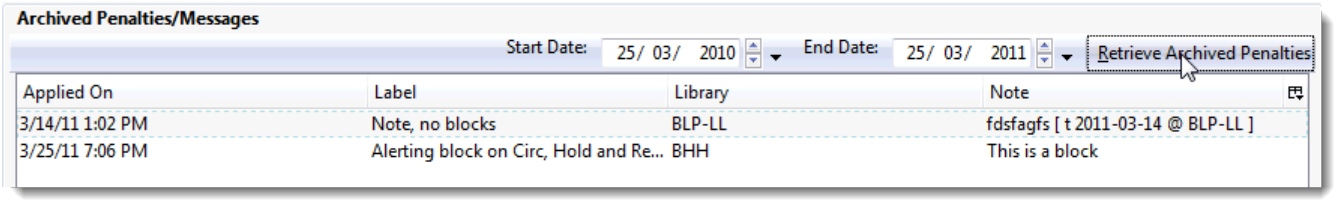
5. To remove Note/Alert/Block, highlight it and click *Actions for these Penalties/Messages* → *Remove Penalty/Message*



6. Note/Alert/Block can be modified or archived by using *Modify Penalty/Message* or *Archive Penalty/Message* on the above dropdown menu.

7. An archived penalty/message can be retrieved in the *Archived Penalties/Messages* panel below.

   Specify the time frame then click *Retrieve Archived Penalties*.



See Notes note in patron summary is not displayed for a note created on the Messages screen.

Alerts and blocks created on the Messages screen are displayed on the Alert screen.

Blocks created on the Messages screen blocks some circulation activities. Staff with appropriate permission may override it.

System-generated standing penalties are displayed on the Messages screen.

Based on your library's setting, staff initials may be required when creating a Note/Alert/Block. See Chapter 48, *Local Administration Menu*

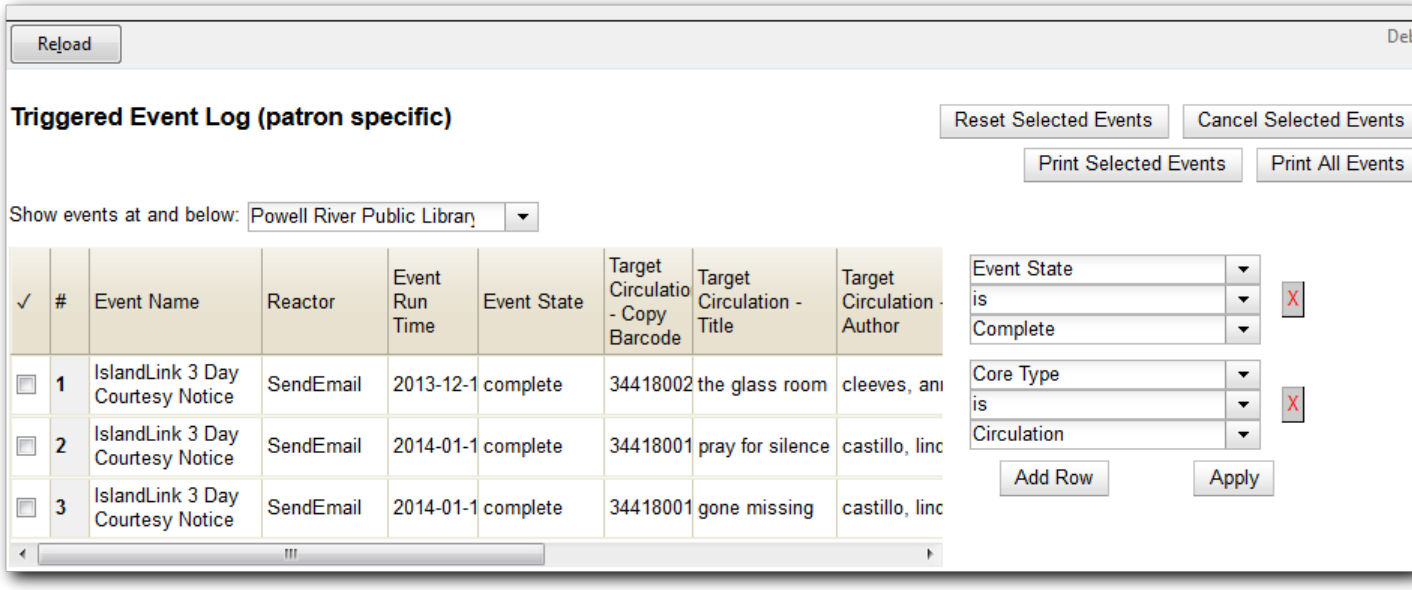
6.5.4. Notifications

Evergreen may send email and SMS messages to patrons via Action Triggers. Currently Sitka sends pre-due and overdue notices via email and hold-ready-for-pickup notices via both email and SMS. An event is created when circulation or hold records meet the condidtions set up in the event definition. When the event is processed, a notice may be generated and passed to the email server to be delivered to patrons. Triggered events are viewable on the staff client via patron or item records. They may help libraries find out whether notices have been generated for a particular patron or item.

To view triggered events for a patron

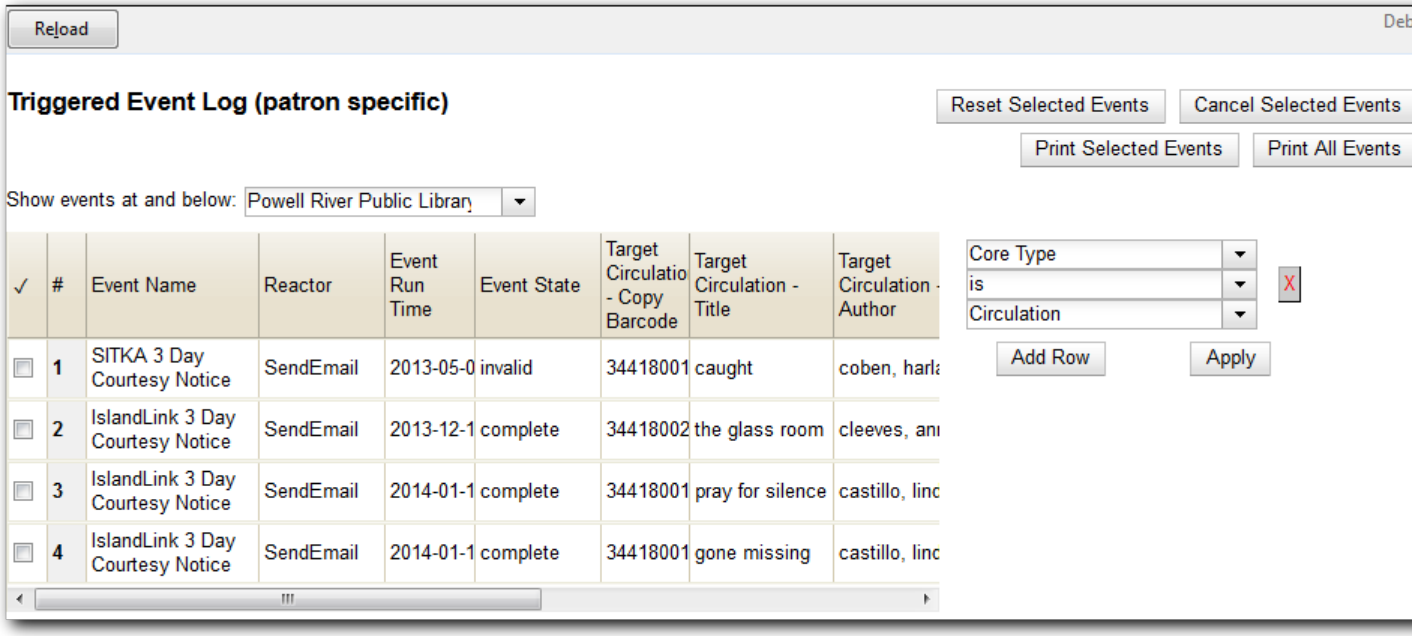
1. Find the patron record and go to *Other* → *Triggered Events*

2. By default, events with *complete* status for pre-due and overdue notices are displayed.


Reload
Triggered Event Log (patron specific)
Reset Selected Events
Cancel Selected Events
Print Selected Events
Print All Events
Show events at and below: Powell River Public Library
✓ # Event Name Reactor Event Run Time Event State Target Circulatio - Copy Barcode Target Circulation - Title Target Circulation - Author
1 IslandLink 3 Day Courtesy Notice SendEmail 2013-12-1 complete 34418002 the glass room cleeves, ani
2 IslandLink 3 Day Courtesy Notice SendEmail 2014-01-1 complete 34418001 pray for silence castillo, linc
3 IslandLink 3 Day Courtesy Notice SendEmail 2014-01-1 complete 34418001 gone missing castillo, linc
Event State is Complete
Core Type is Circulation
Add Row
Apply

3. Use the filter on the right to view hold notification events. Click the arrow beside *Circulation* and choose *Hold* in the dropdown list. Click *Apply*.

4. To view all events with any status, you may remove the *Event State* filter by clicking the red X beside it.


Reload
Triggered Event Log (patron specific)
Reset Selected Events
Cancel Selected Events
Print Selected Events
Print All Events
Show events at and below: Powell River Public Library
✓ # Event Name Reactor Event Run Time Event State Target Circulatio - Copy Barcode Target Circulation - Title Target Circulation - Author
1 SITKA 3 Day Courtesy Notice SendEmail 2013-05-0 invalid 34418001 caught coben, harl
2 IslandLink 3 Day Courtesy Notice SendEmail 2013-12-1 complete 34418002 the glass room cleeves, ani
3 IslandLink 3 Day Courtesy Notice SendEmail 2014-01-1 complete 34418001 pray for silence castillo, linc
4 IslandLink 3 Day Courtesy Notice SendEmail 2014-01-1 complete 34418001 gone missing castillo, linc
Core Type is Circulation
Add Row
Apply

5. You may add more filters by clicking *Add Row*.

6. You may reset events with *complete* status to generate a new notice by selecting the checkbox in front of the events, then clicking *Reset Selected Events*.

7. You may cancel events with *pending* status to stop the notice generation by selecting the events, then clicking *Cancel Selected Events*.

Action Triggers are used for, but not limited to, pre-due, overdue and hold notification generation. You may see other triggered events in a patron or item record.

Some triggered events do not generate notices, e.g. most events generated by marking-long-overdue-items-lost triggers do not generate notices.

Complete status means that the event has been successfully processed. Usually this means the notice has been generated, unless the notice generation process encunters an error, which is very rare.

Events with status of *Invalid* or *Error* encountered problems during the process. No notices were generated for such events.

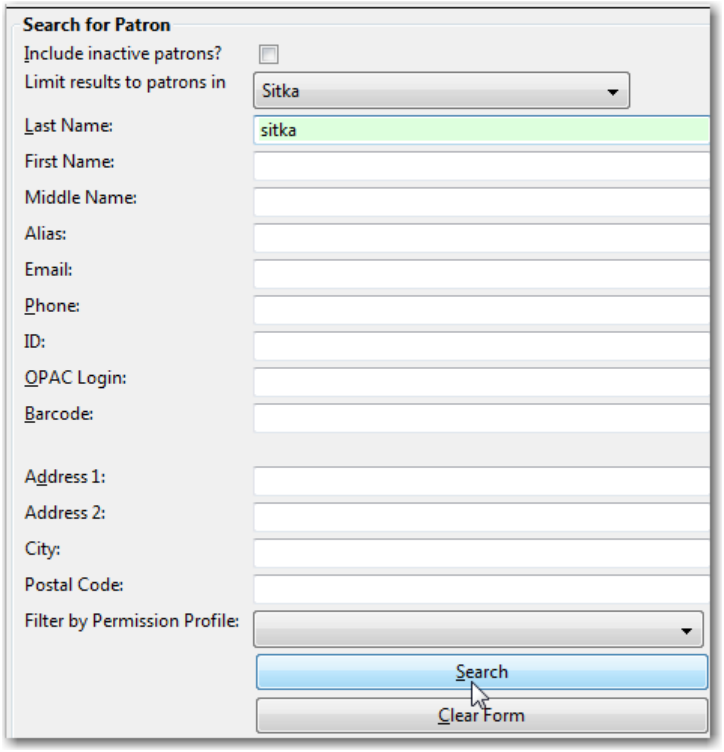
Pending and some statuses other than *complete, error, or invalid* may last for a short period of time while the event is being processed.

6.6. Merging Patron Records

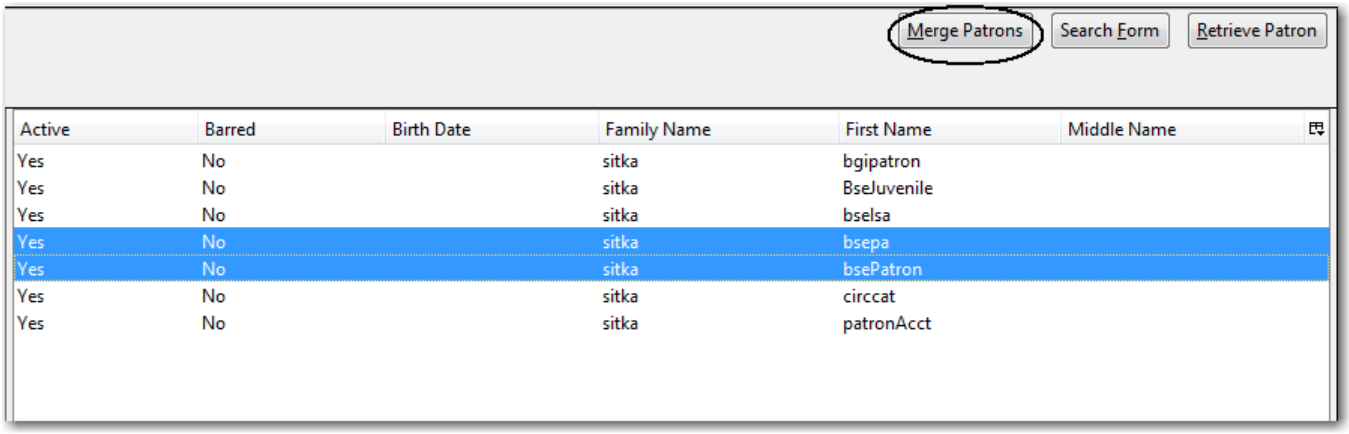
Patron accounts can only be merged together if both accounts have the same home library. Staff may need to update the home library in one of the accounts before performing the merge.

1. Go to the patron search screen by the dropdown menu *Search* → *Search for Patrons*.

2. To load the two records on the same search results screen, search by the terms shared by the two records, such as names, phone numbers, etc. Hit **Enter** or click *Search*.

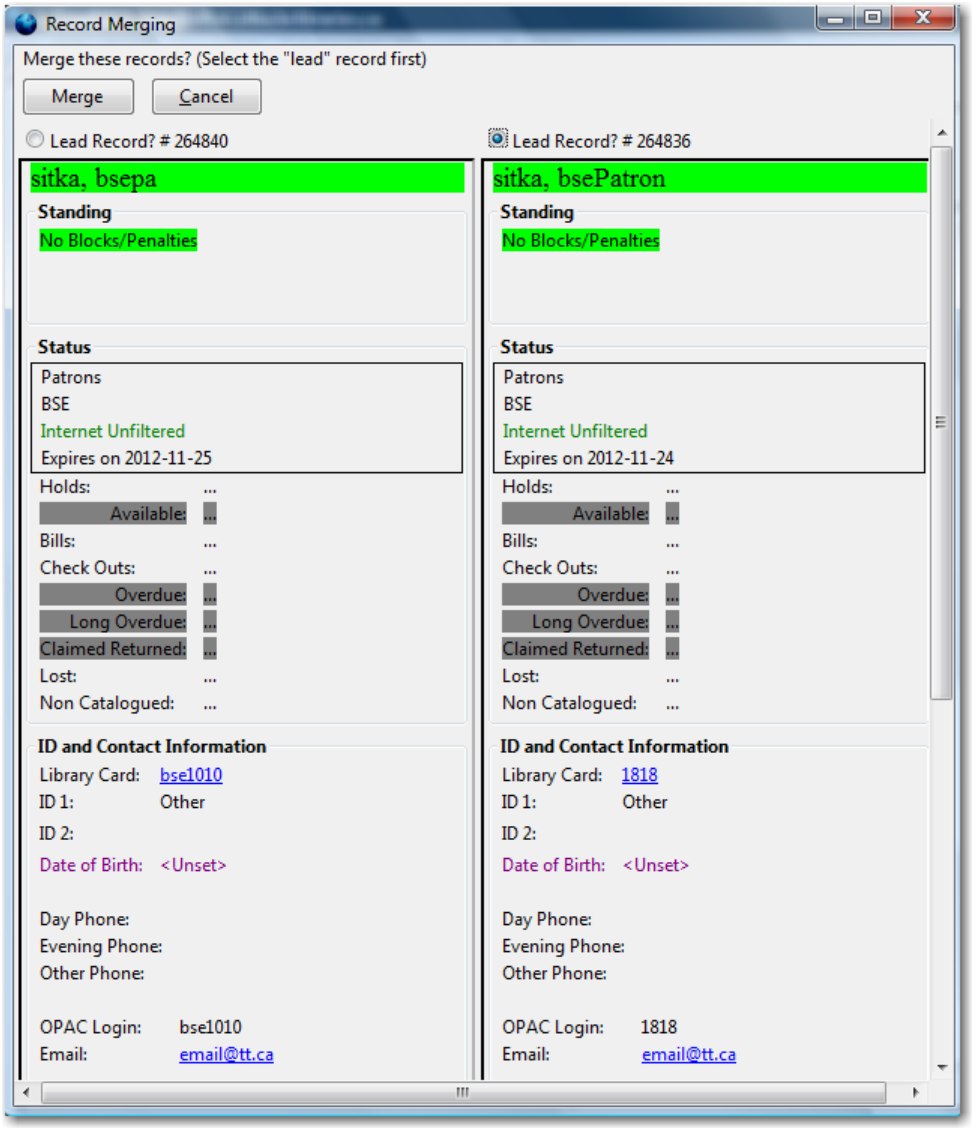


3. Select the two records you want to merge by pressing down the **CTRL** key and clicking each record. Click *Merge Patrons* on the top right of the screen.



4. Select the record you want to keep by checking the radio button *Lead Record?#* on top of the record. Click *Merge* button.

If you want to choose the barcode to keep, you need to choose the record with it as the lead record.



Once two records have been merged, the notes, bills, holds, and outstanding items under the non-lead record are brought to the lead record. Staff-inserted alert messages are not.

Local System Administration permission is required to merge patron records. Sitka support recommends discarding the non-lead card and deleting it as described in Section 51.1, “Deleting Inactive Cards” Your library can also choose to automatically delete inactive card by configuring the Library Setting Patron Merge Barcode Delete to True

An inactive card will retrieve the active account when used on *Check Out* screen. The system alerts staff to the situation with an informative message.

6.7. Deleting Patron Records

Sitka's in-house Patron Deletion Tool is available on the Welcome page. See Patron Deletion Tool. Local System Administrator's permissions are required to delete a patron record.

Chapter 7. Circulation

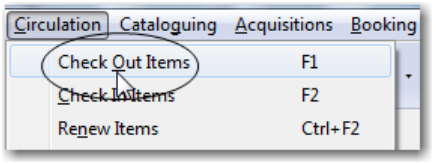
Besides the regular items in the catalogue, Sitka Evergreen can circulate pre-catalogued, and non-catalogued items, too.

- Regular circulation: circulation of regular items in your catalogue with a barcode.
- Pre-catalogued (aka *pre-cat*) circulation: circulation of items that have a barcode but have not been catalogued yet. You may check them out and send for cataloguing after they are returned. Many Sitka sites use this functionality to circulate interlibrary loan items from other libraries. There is no need to route to cataloguing when using pre-cat for ILL, you can simply ignore the alert.
- Non-catalogued (aka *non-cat*) circulation: circulation of items that are not in your catalogue and without a barcode. These items are usually identified by categories, such as magazines, paperbacks, etc.

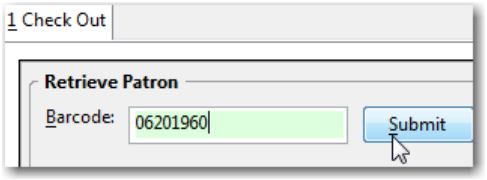
7.1. Check Out (F1)

Regular Items

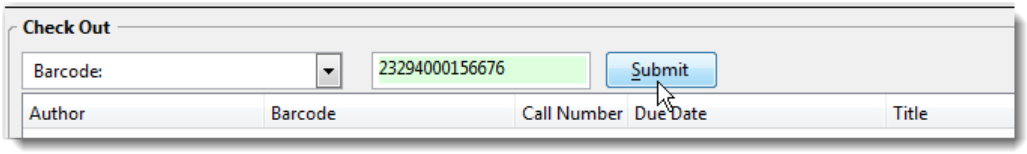
1. To check out an item press **F1** or select *Circulation* → *Check Out Items*.



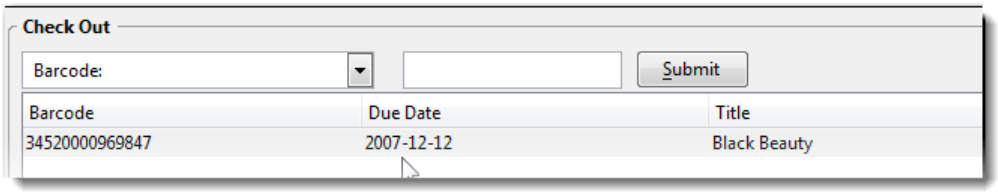
2. Scan or enter patron's barcode and click *Submit* if entering barcode manually. If scanning, number is submitted automatically.



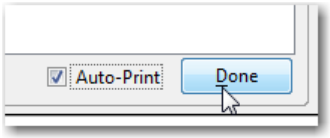
3. Scan or enter item barcode manually, clicking *Submit* if manual.



4. *Due date* is now displayed.



5. When all items are scanned, click *Done* at bottom right of screen to generate slip receipt or to exit patron record if not printing slip receipts.

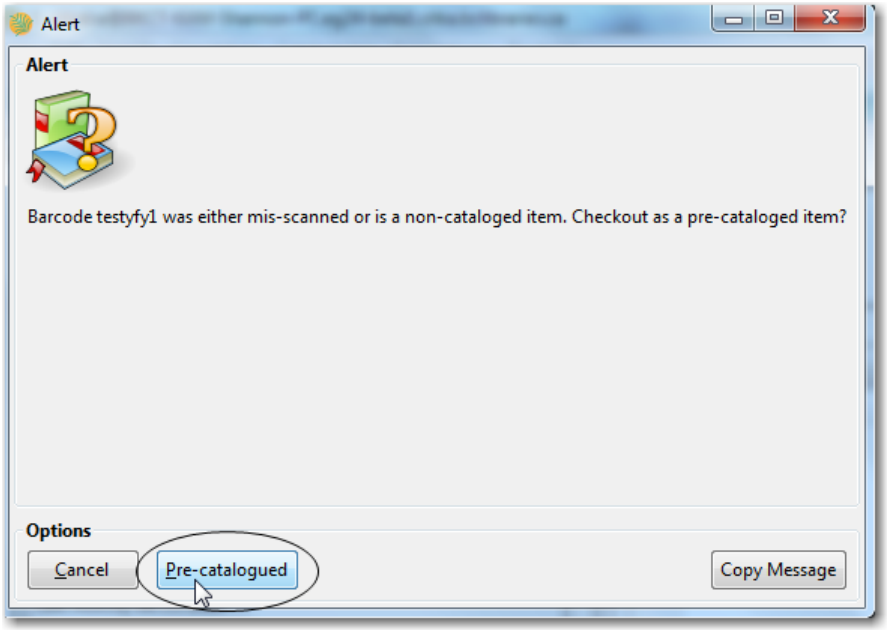


Pre-catalogued Items

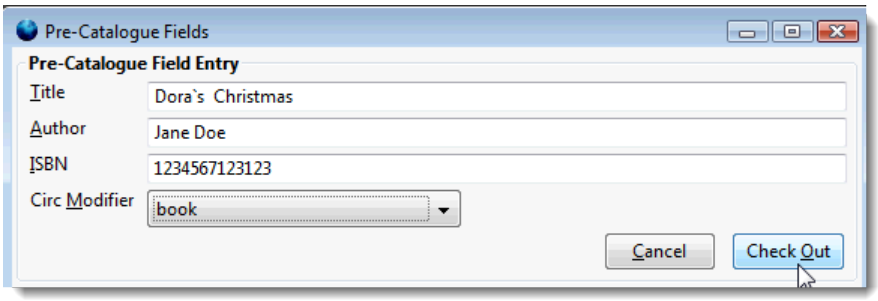
1. Go to patron's *Check Out* screen by *Circulation* → *Check Out Items*.

2. Scan the item barcode.

3. At prompt, click *Pre-catalogued*.



4. Enter required information and click *Checkout*.



On check-in, Evergreen will prompt staff to re-route the item to cataloguing.

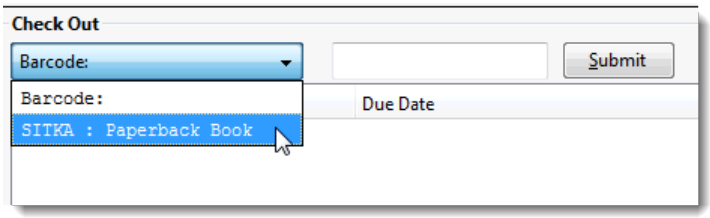
Non-catalogued Items

You can use this function for items such as paperbacks or magazines that you may not care if the patron doesn't return. Items are checked out with a due date but when the due date expires, the items disappear from the patron's record and no fines accrue. Circulation statistics are collected.

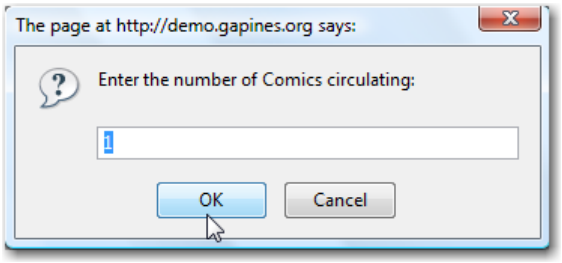
Non-cat circulation statistics are kept separately from regular and pre-cat circulation statistics. Use Sitka's non-cat circulation reports to generate the numbers.

1. Go to the patron's *Check Out* screen by *Circulation* → *Check Out Items*.

2. Click on the drop-down list in *Barcode* and choose the type of non-catalogued items.



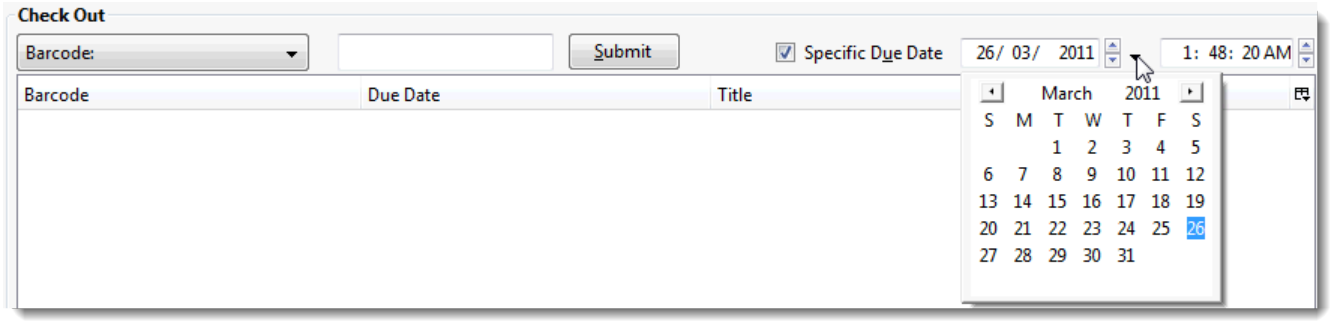
3. Enter the number of items being circulated and click *OK*.

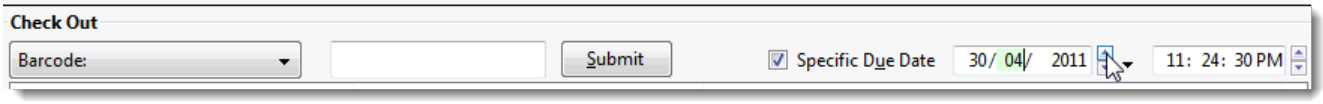


Due Dates

Circulation periods may be pre-set. When items are checked out, due dates are automatically calculated and inserted into circulation records if the *Specific Due Date* checkbox is not selected on the *Check Out* screen. The *Specific Due Date* checkbox allows you to set a different due date to override the pre-set loan period.

Before you scan the item, select the *Specific Due Date* checkbox. Use the calendar widget to select a date. Or click in day, month or year, then use the up or down arrows to make the change or simply delete the data, then enter again. Time is used for hourly loan only. This date applies to all items until you change the date; de-select *Specific Due Date* checkbox or quit the patron record.





7.2. Check In (F2)

Regular Check In

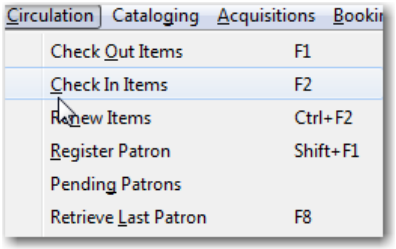
Backdated Check In

Backdate Post-Checkin

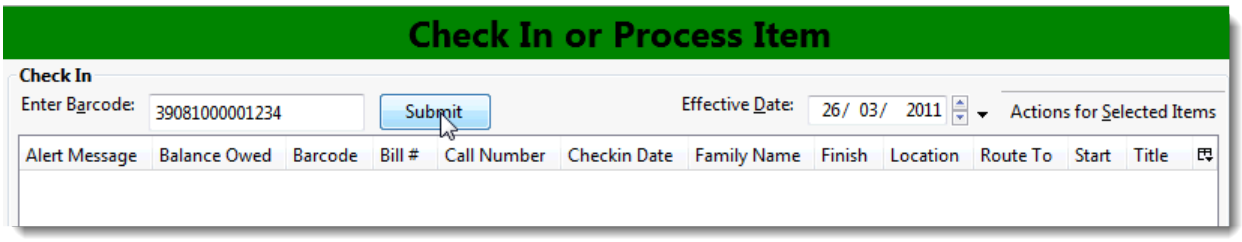
Mark Item as Missing Pieces

Regular Check In

1. To check in an item, select *Circulation* → *Check In Items*, or press **F2**.



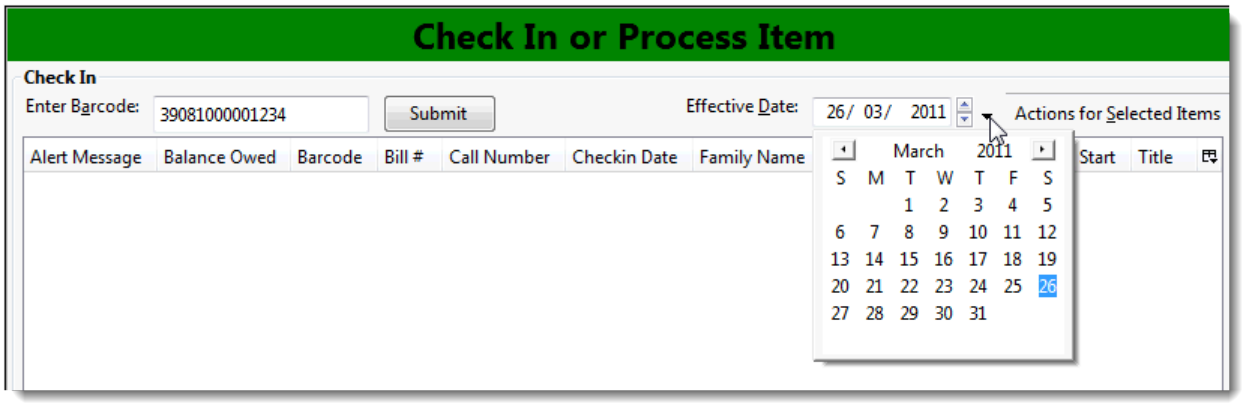
2. Scan item barcode or enter manually and click *Submit*.



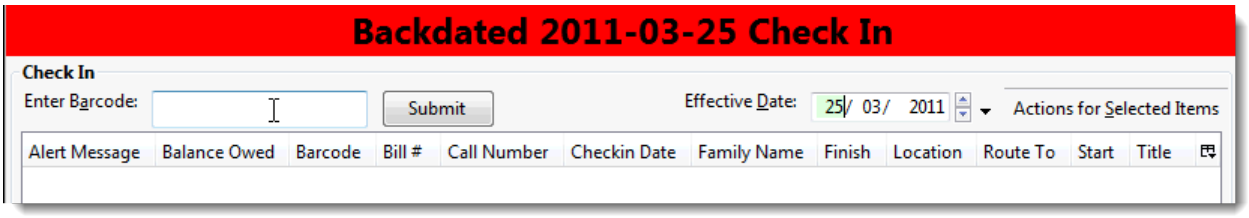
Backdated Check In

This is useful for clearing a book drop.

1. To change effective check-in date, select *Circulation* → *Check In Items*, or press **F2**. Use the calendar widget to choose the effective date.



2. The top green bar changes to red. The new effective date is now displayed in the header.

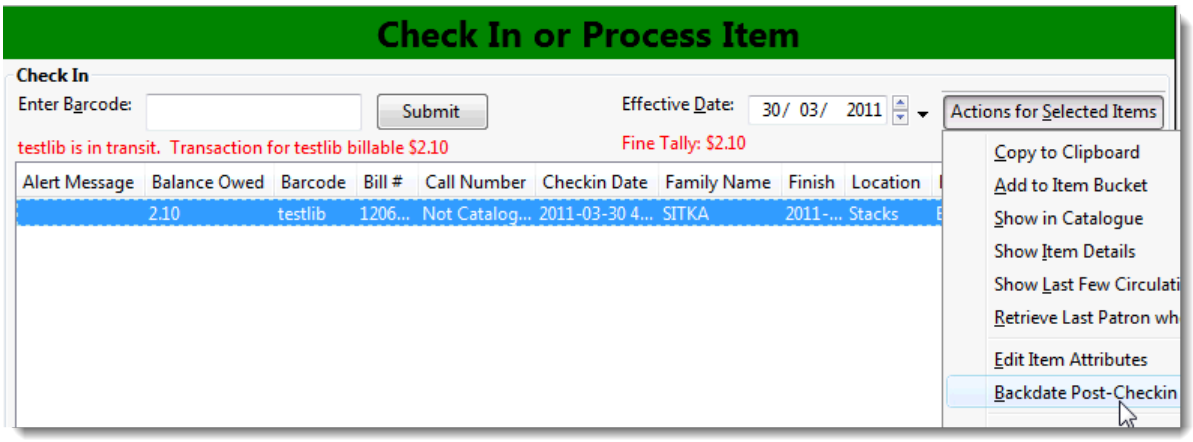


3. Move the cursor to the *Barcode* field. Scan the items. When finishing backdated check-in, change the *Effective Date* back to today's date.

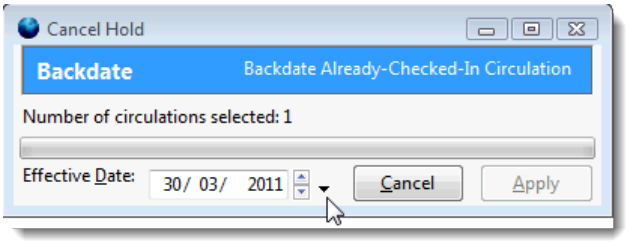
Backdate Post-Checkin

After an item has been checked in, you may use the *Backdate Post-Checkin* function to backdate the check-in date.

1. Select the item on the *Check In* screen, click *Actions for Selected Items* → *Backdate Post-Checkin*.



2. Use the calendar widget to select an effective check-in date. Click *Apply*. Overdue fines, if any, will be adjusted according to the new effective check-in date.



At the right bottom corner there is a *Checkin Modifiers* pop-up list. The options are:

- Ignore Pre-cat Items: no prompt when checking in a pre-cat item. Item will be routed to Cataloguing with Cataloguing status.
- Supress Holds and Transit: item will not be used to fill holds or sent in transit. Item has Reshelving status.
- Amnesty Mode/Forgive Fines: overdue fines will be voided if already created or not be inserted if not yet created (e.g. hourly loans).
- Auto-Print Hold and Transit Slips: slips will be automatically printed without prompt for confirmation.
- Clear Holds Shelf. Checking in hold-shelf-expired items will clear the items from the hold shelf (holds to be cancelled).
- Retarget Local Holds. When checking in in process items that are owned by the library, attempt to find a local hold to retarget. This is intended to help with proper targeting of newly-catalogued items.
- Retarget All Statuses. Similar to Retarget Local Holds, this modifier will attempt to find a local hold to retarget, regardless of the status of the item being checked in. This modifier must be used in conjunction with the Retarget Local Holds modifier.
- Capture Local Holds as Transits. With this checkin modifier, any local holds will be given an in transit status instead of on holds shelf. The intent is to stop the system from sending holds notifications before the item is ready to be placed on the holds shelf and item will have a status of in-transit until checked in again. If you wish to simply delay notification and allow time for staff to process item to holds shelf, you may wish to

use the Hold Shelf Status Delay setting in Library Settings Editor instead. See Local Administration section for more information.

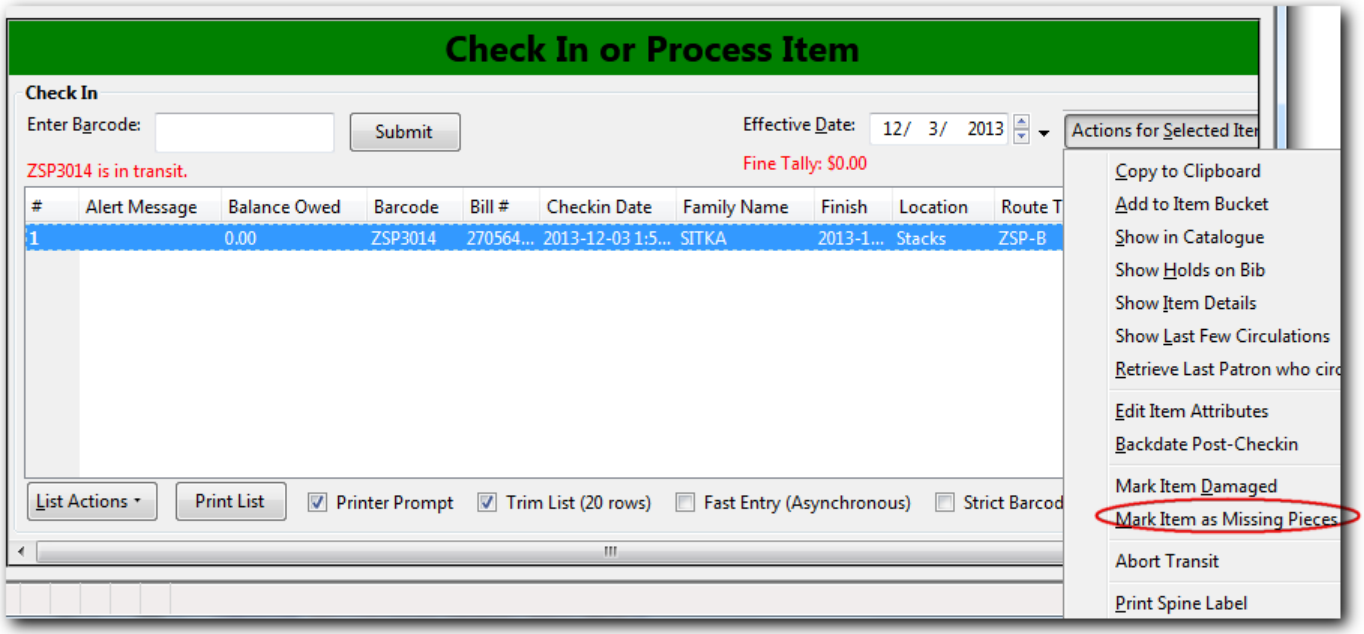
- Manual Floating Active. This check in modifier works in conjunction with floating groups, as configured for your library by Sitka support. See Floating Groups.

These options may be selected simultaneously. The selected option is displayed in the header area.

Mark Item as Missing Pieces

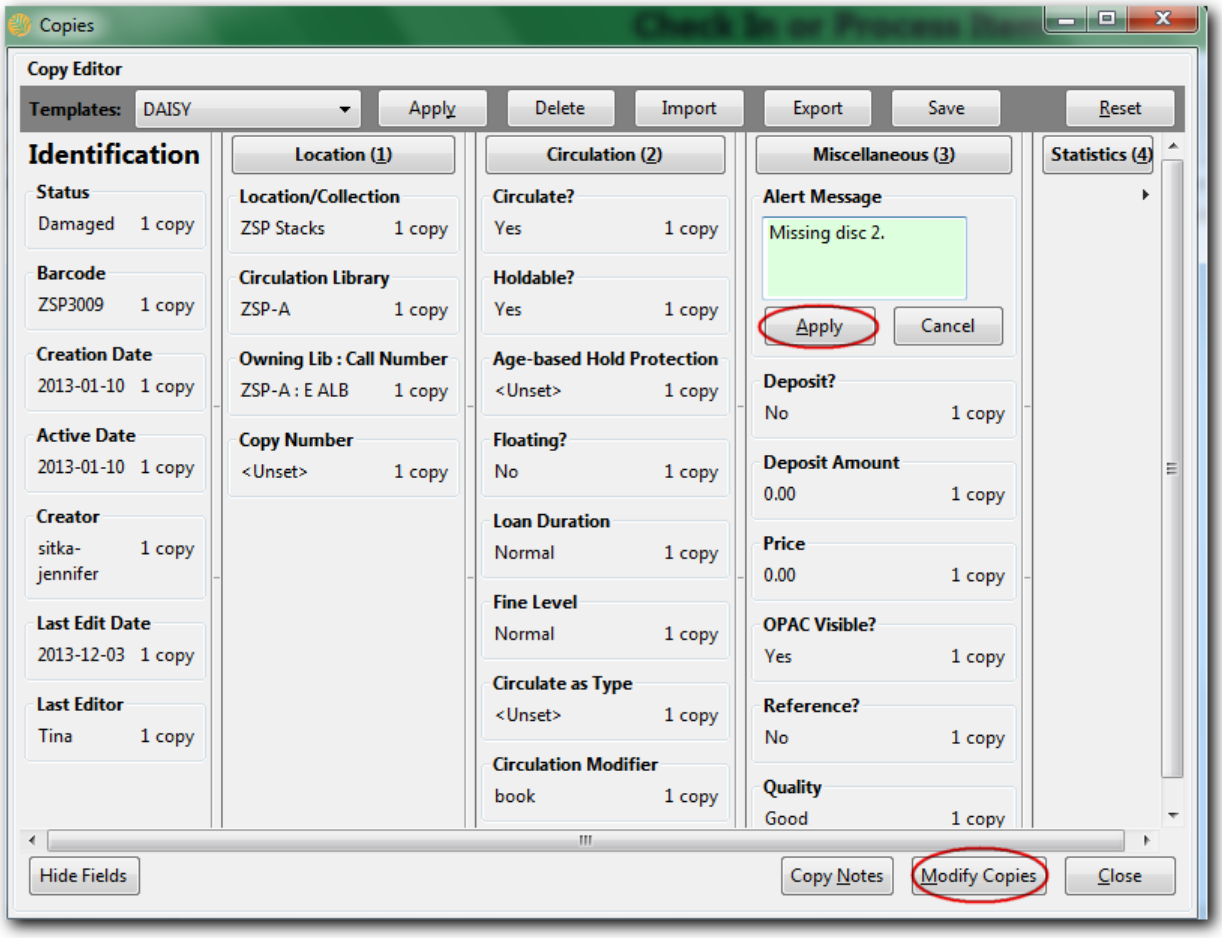
If an item is returned with missing pieces, you may mark the item as missing pieces. You will be prompted to print a slip, which can be inserted in the item, insert a copy and a patron alert message into the respective records, and print a letter or note to inform the patron. The item's status is set to *Damaged*. When the missing pieces are returned, you need to check in the item, which sets the status to *Reshelving*. You also need to manually remove the patron and copy alert messages.

1. Select the item on the *Check In* screen, click *Actions for Selected Items* → *Marking Items as Missing Pieces*. Click *OK* on the prompt.

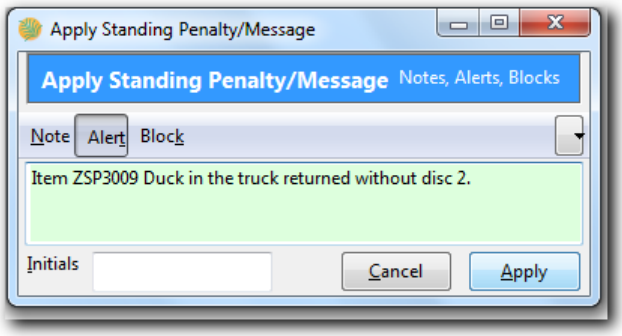


2. Choose the printer and click *OK* to print a slip to be inserted into the item.

3. The *Copy Editor* will be opened. Fill in the alert message. Click *Apply* and then *Modify Copies* at the bottom



4. The prompt for a patron alert or note shows up. Click *Alert*, if you wish to add an alert. Type in the content and your initial. Click *Apply*.

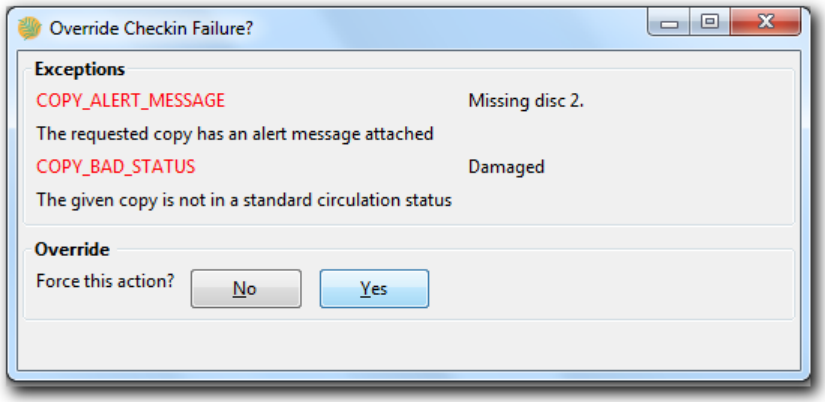


5. *Notepad* will open for you to edit and print a letter/note for the patron.

Windows *Command Prompt* window will open. It will be closed once *Notepad* is closed.

The item's status is set to *Damaged* once it is marked as missing pieces.

When the missing piece is returned, check in the item. You will be prompted of the item's status and the copy alert message. You need go to the patron and item record to remove the alert messages.



Pre-catalogued items can not be marked as missing pieces.

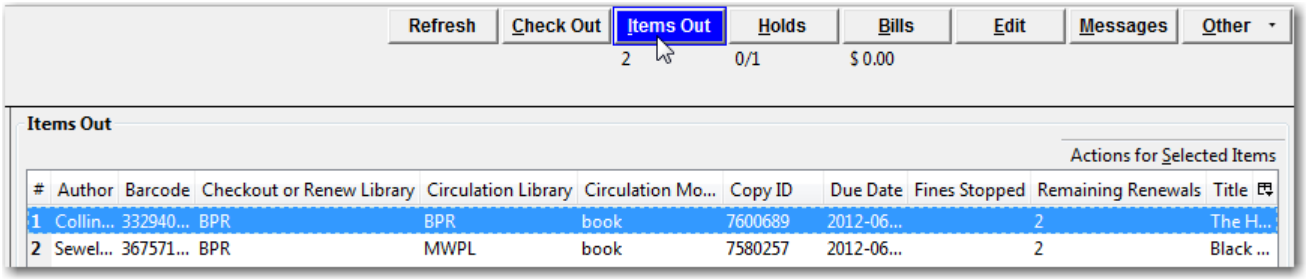
Currently you need to send In Transit items back to the owning library to mark it as missing pieces.

7.3. Renewal and Editing the Item's Due Date

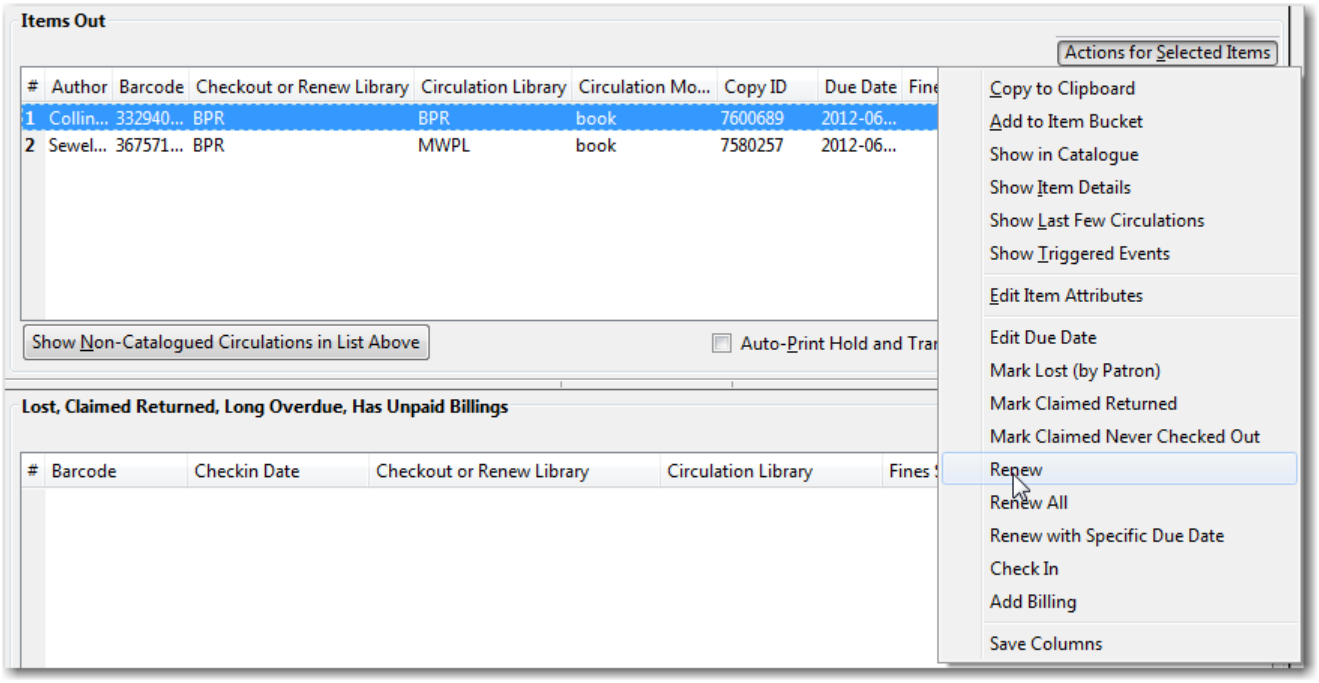
Checked-out items can be renewed if your library's policy allows it. The new due date is calculated from the renewal date. Existing loans can also be extended to a specific date by editing the due date or renewing with a specific due date.

Renewal

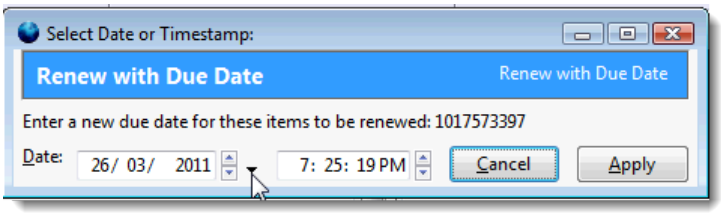
1. Retrieve the patron record and go to the *Items Out* screen.



2. Select the item you want to renew. Click on *Actions for Selected Items* → *Renew*. If you want to renew all items in the account, click *Renew All* instead.


Items Out
Actions for Selected Items
Author Barcode Checkout or Renew Library Circulation Library Circulation Mo... Copy ID Due Date
1 Collin... 332940... BPR BPR book 7600689 2012-06...
2 Sewel... 367571... BPR MWPL book 7580257 2012-06...
Show Non-Catalogued Circulations in List Above
Auto-Print Hold and Tra
Lost, Claimed Returned, Long Overdue, Has Unpaid Billings
Barcode Checkin Date Checkout or Renew Library Circulation Library Fines
Copy to Clipboard
Add to Item Bucket
Show in Catalogue
Show Item Details
Show Last Few Circulations
Show Triggered Events
Edit Item Attributes
Edit Due Date
Mark Lost (by Patron)
Mark Claimed Returned
Mark Claimed Never Checked Out
Renew
Renew All
Renew with Specific Due Date
Check In
Add Billing
Save Columns

3. If you want to specify the due date, click *Renew with Specific Due Date*, you will be prompted to select a due date. Once done, click *Apply*.

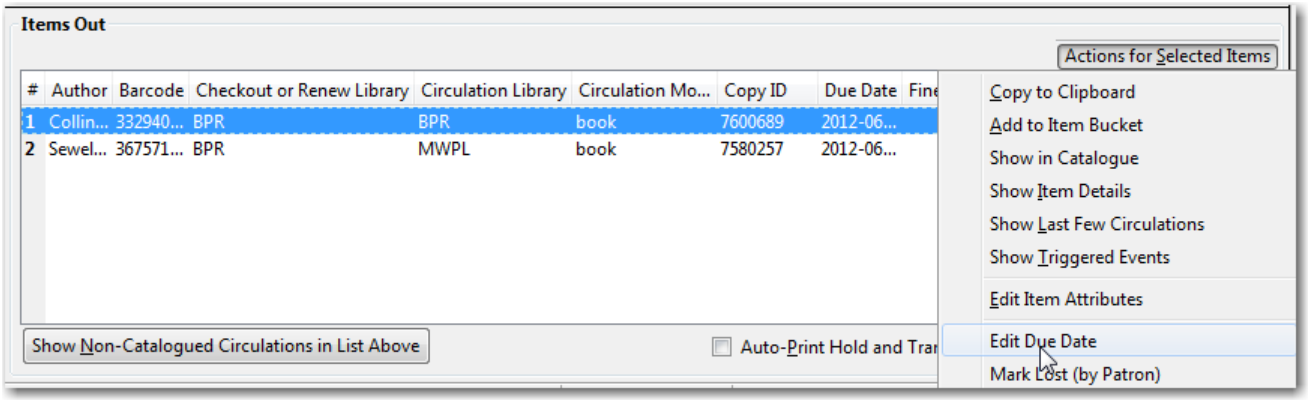

Select Date or Timestamp:
Renew with Due Date
Renew with Due Date
Enter a new due date for these items to be renewed: 1017573397
Date: 26/ 03/ 2011
7: 25: 19 PM
Cancel
Apply

Renewal can also be done on the *Item Status* screen. See Section 7.6, "Item Status (F5)" for more informaiton.

Editing Due Date

1. Retrieve the patron record and go to the *Items Out* screen.

2. Select the item you want to renew. Click on *Actions for Selected Items* → *Edit Due Date*.


Items Out
Actions for Selected Items
Author Barcode Checkout or Renew Library Circulation Library Circulation Mo... Copy ID Due Date Fine
1 Collin... 332940... BPR BPR book 7600689 2012-06...
2 Sewel... 367571... BPR MWPL book 7580257 2012-06...
Copy to Clipboard
Add to Item Bucket
Show in Catalogue
Show Item Details
Show Last Few Circulations
Show Triggered Events
Edit Item Attributes
Edit Due Date
Mark Lost (by Patron)
Show Non-Catalogued Circulations in List Above
Auto-Print Hold and Tra

3. Select a new due date in the pop-up window, then click *Apply*.

You can select multiple items by pressing down the **CTRL** key on your keyboard and clicking each item you want to edit.

Edit Due Date changes the due date in the existing circulation record without reducing the remaining renewal count or creating a new circulation record. It does not generate new circulation statistics. Outstanding issues on the circulation, such as overdue fines, may be affected by future actions, such as backdated checkin. Since one circulation may receive only one pre-due/overdue (for each overdue period) notice, no new notice(s) will be generated, if aleady sent out. For example, editing the due date on the day when an item is due will not generate a new pre-due notice near the new due date.

Sitka support team strongly recommends libraries use this function only when staff forgot to set *Specific Due Date* on *Checkout*. Use *Renew with Specific Due Date* in other circumstances to avoid undesirable result.

7.4. Marking Items Lost, Claimed Returned, and Claimed Never Checked Out

Lost Items

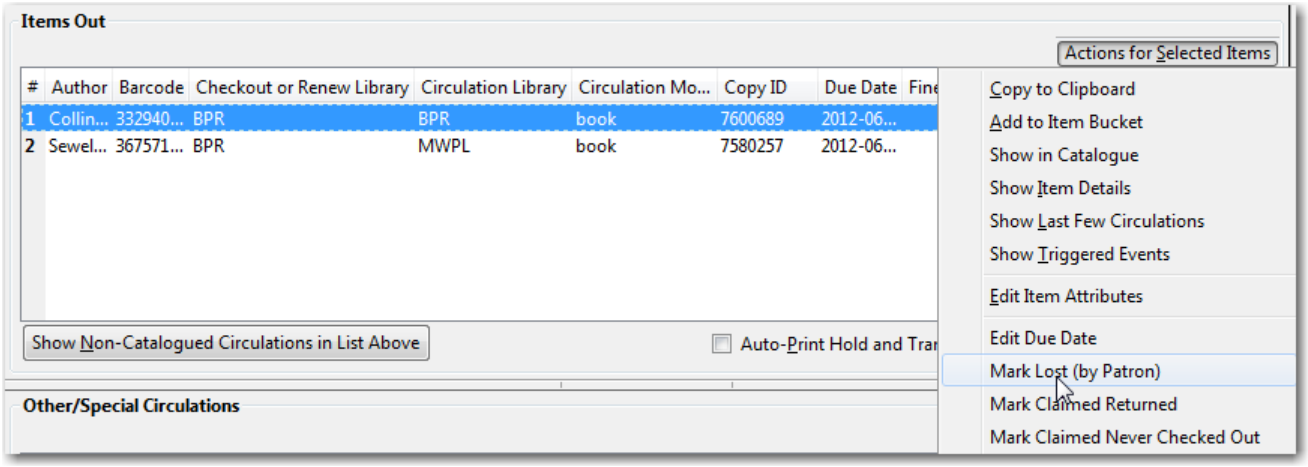
Claimed Returned Items

Claimed Never Checked Out

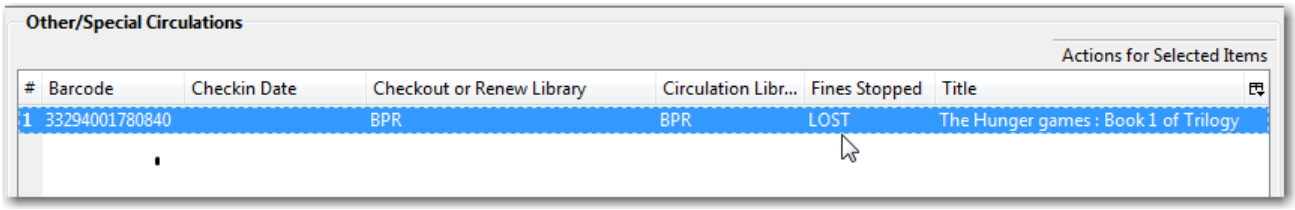
Lost Items

1. To mark items Lost, retrieve patron record and click *Items Out*.

2. Select the item. Click on *Actions for Selected Items* → *Mark Lost (by Patron)*.


Items Out
Actions for Selected Items
Author Barcode Checkout or Renew Library Circulation Library Circulation Mo... Copy ID Due Date
1 Collin... 332940... BPR BPR book 7600689 2012-06...
2 Sewel... 367571... BPR MWPL book 7580257 2012-06...
Copy to Clipboard
Add to Item Bucket
Show in Catalogue
Show Item Details
Show Last Few Circulations
Show Triggered Events
Edit Item Attributes
Edit Due Date
Mark Lost (by Patron)
Mark Claimed Returned
Mark Claimed Never Checked Out
Show Non-Catalogued Circulations in List Above
Auto-Print Hold and Tra
Other/Special Circulations

3. By default, the lost item now displays in the *Other/Special Circulations* pane.


Other/Special Circulations
Actions for Selected Items
Barcode Checkin Date Checkout or Renew Library Circulation Libr... Fines Stopped Title
1 33294001780840 BPR BPR LOST The Hunger games : Book 1 of Trilogy

Marking an item Lost will automatically bill the patron the replacement cost of the item as recorded in the price field in the item record or the price limits set up by the library, and a processing fee as determined by your local policy. If the price field is blank, a default replacement cost as determined by the library is used. Based on the library's setting, if the price is 0.00, the replacement cost charge may be 0.00 or the default amount. If there is no default cost, you may manually add the replacement cost portion to the bill. See Section 8.5, “Adding New "Grocery" Bills” for more information.

If the lost item has overdue charges, based on your library’s setting, the overdue charges may be voided or retained.

When a lost item is found and returned, your library may choose to:

- Always void lost charges.
- Void lost charges if the item is returned within a specified time period, e.g. within 6 months since the due date.
- Restore existing overdue fines.
- Generate new overdue fines based on the checkin date.

By default, a lost-then-returned item will disappear from the *Items Out* screen only when all bills linked to this particular circulation have been resolved. Bills include replacement charges, overdue charges, and manual charges added to the existing bills.

The following are some common scenarios you may encounter:

1. No payment has been made yet. When the item is returned, the lost bills are voided and there is no restored overdue charge. The bill and circulation record will be closed and the item will disappear from the *Items Out* screen.

2. No payment has been made yet. When the item is returned, the lost bills are voided, but there are restored overdue charges. The overdue bill will be open. The item will be displayed on the *Items Out* screen due to the unpaid bill. The item will disappear once the overdue charges are cleared.

3. The lost bills have been paid already. When the item is returned, the lost bills are voided and there is no overdue charge or the restored overdue charges are less than the replacement cost. There will be a negative balance in the bill. A refund (see Section 8.7, "Refund" for more details) needs to be made to close the bill and the circulation record. Or you may add a billing to the bill to make the balance 0.00. Once the outstanding amount has been refunded, the bill and circulation record will be closed and the item will disappear from the *Items Out* screen.

If your library chooses not to automatically void a lost item billing when it is returned, staff need to deal with the bills manually, as per your local policy.

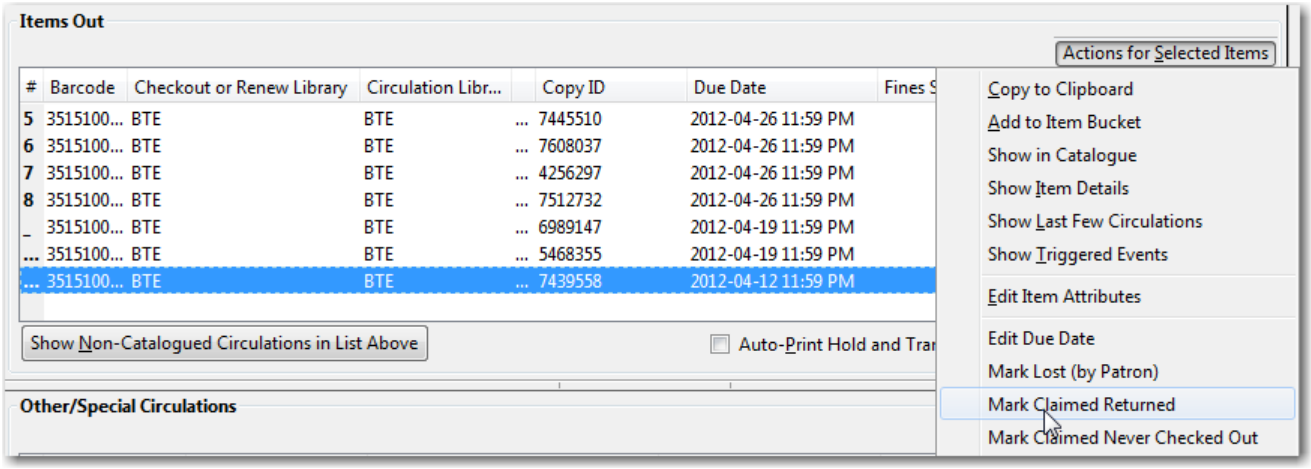
From version 2.6, libraries have the option to set up whether/where to display Lost items on *Items Out* screen.

For all the above mentioned settings, See Chapter 48, *Local Administration Menu* for more information.

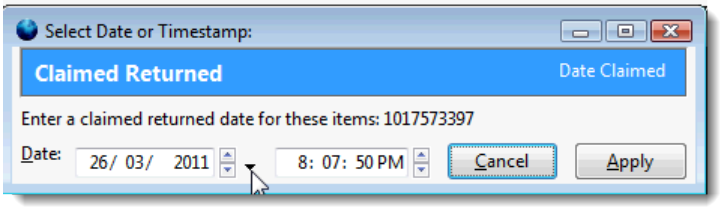
Claimed Returned Items

1. To mark an item Claimed Returned, retrieve patron record and go to the *Items Out* screen.

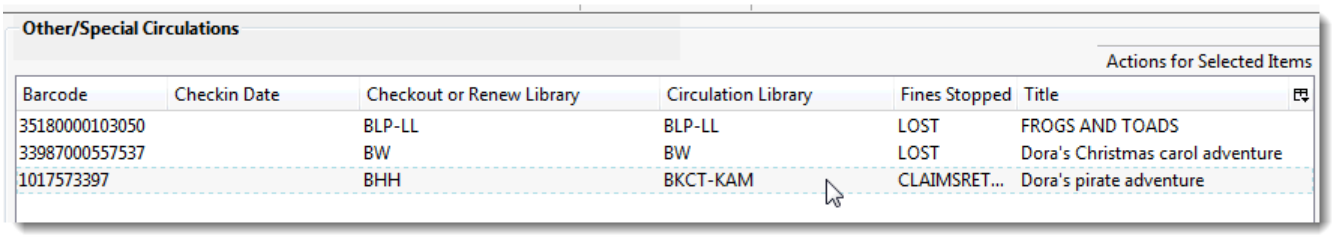
2. Select the item, then *Actions for Selected Items* → *Claimed Returned* from the dropdown menu.


Items Out
Actions for Selected Items
Barcode Checkout or Renew Library Circulation Libr... Copy ID Due Date Fines S
5 3515100... BTE BTE ... 7445510 2012-04-26 11:59 PM
6 3515100... BTE BTE ... 7608037 2012-04-26 11:59 PM
7 3515100... BTE BTE ... 4256297 2012-04-26 11:59 PM
8 3515100... BTE BTE ... 7512732 2012-04-26 11:59 PM
3515100... BTE BTE ... 6989147 2012-04-19 11:59 PM
... 3515100... BTE BTE ... 5468355 2012-04-19 11:59 PM
... 3515100... BTE BTE ... 7439558 2012-04-12 11:59 PM
Show Non-Catalogued Circulations in List Above
Auto-Print Hold and Trar
Other/Special Circulations
Copy to Clipboard
Add to Item Bucket
Show in Catalogue
Show Item Details
Show Last Few Circulations
Show Triggered Events
Edit Item Attributes
Edit Due Date
Mark Lost (by Patron)
Mark Claimed Returned
Mark Claimed Never Checked Out

3. Select a date and click *Apply*.



4. The Claimed Returned item, by default, displays in the *Other/Special Circulations* pane.



The date entered for a Claimed Returned establishes the fine. If the date given is past, bills will be adjusted accordingly.

When a Claimed Returned item is returned, if there is an outstanding bill associated with it, by default, the item will not disappear from the *Items Out* screen. It will disappear when the outstanding bills are resolved.

If a patron pays the fine, but staff don't find the item and check it in, there is a known bug in Evergreen that makes the Claimed Return item disappear from patron's account, which is not correct behaviour. Sitka support recommends the following workaround until bug is resolved programmatically. You may check the item in, and, if wanting to pursue with original patron, check it back out to that patron and mark it Claimed Returned. Alternatively, you can change the item's status to Missing, or simply delete the item, based on library policy and facts of the case. Please contact Sitka support if you encounter this scenario and are uncertain how best to proceed.

When an item is marked Claimed Returned, the value in *Claims-returned Count* field in patron record is automatically increased. But it will not be adjusted when the item is found and checked in. You may manually edit it according to your local policy.

When an item is marked Claimed Returned, the item's status is automatically set to the Sitka wide default status of Claimed Returned.

From version 2.6, libraries have the option to set up whether/where to display ClaimedReturned items on *Items Out* screen.

Claimed Never Checked Out

1. To mark an item Claimed Never Checked Out, retrieve patron record and go to the *Items Out* screen.

2. Select the item, then *Actions for Selected Items* → *Mark Claimed Never Checked Out* from the dropdown menu.

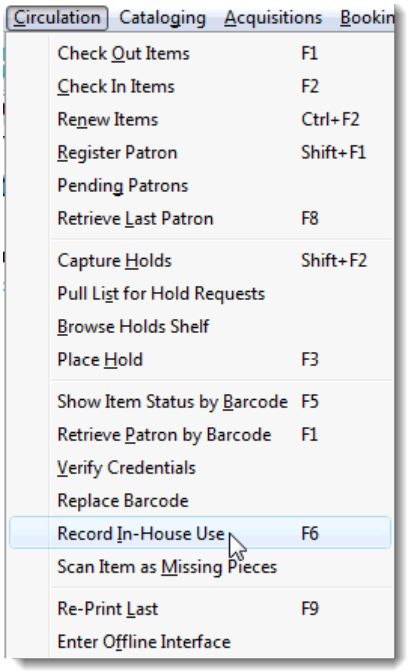
Once an item is marked Claimed Never Checked Out, it disappears from the patron's account. The circulation record is marked checked in as on the checkout date.

An item marked Claimed Never Checked Out has its status changed to Missing by a Sitka default.

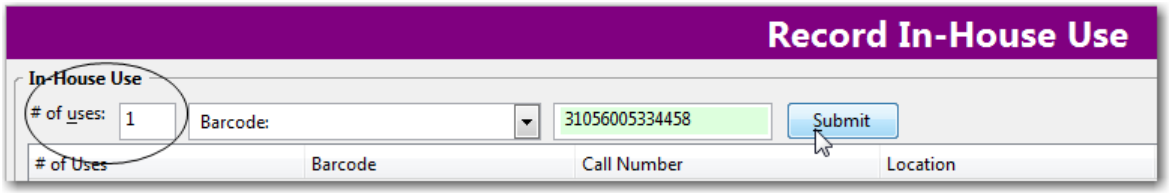
7.5. In-house Use (F6)

You can record in-house use for both catalogued and non-catalogued items.

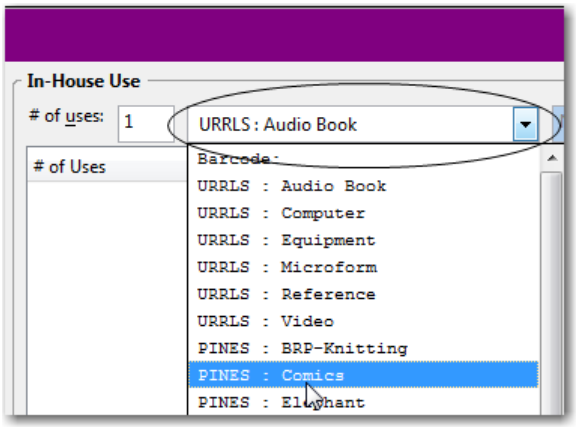
1. To record in-house use, select *Circulation* → *Record-In House Use* or press **F6**.



2. To record in-house use for catalogued items, enter number of uses, scan barcode or type barcode and click *Submit*.



3. To record In-house Use of non-catalogued items, choose appropriate item from the dropdown menu in *Barcode* box and click *Submit*.



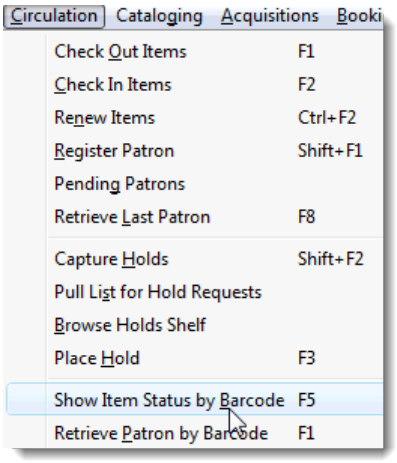
The statistics of in-house use are separated from circulation statistics. The in-house use count of catalogued items is not included in the items' total use count.

7.6. Item Status (F5)

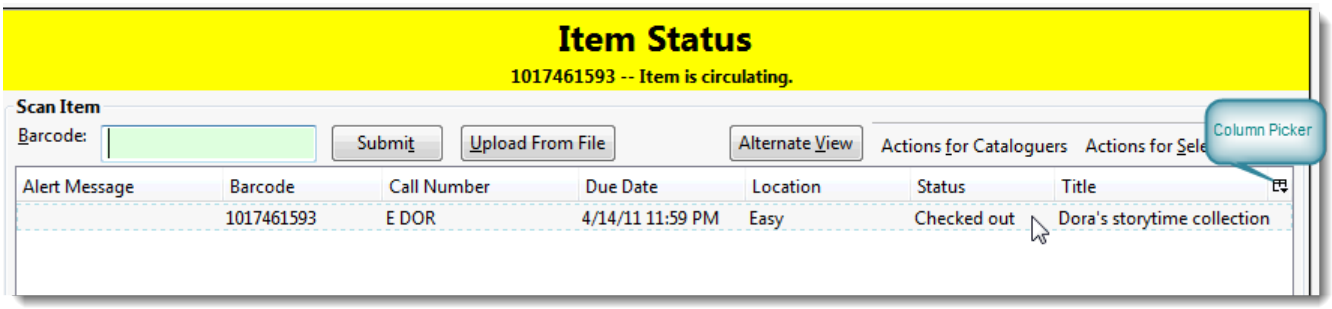
The Item Status screen is very useful. Many actions can be taken by either circulation staff or cataloguers on this screen. Here we will cover some circulation-related functions, namely checking item status, viewing past circulations, inserting item alert messages, marking items missing or damaged, etc.

Checking item status

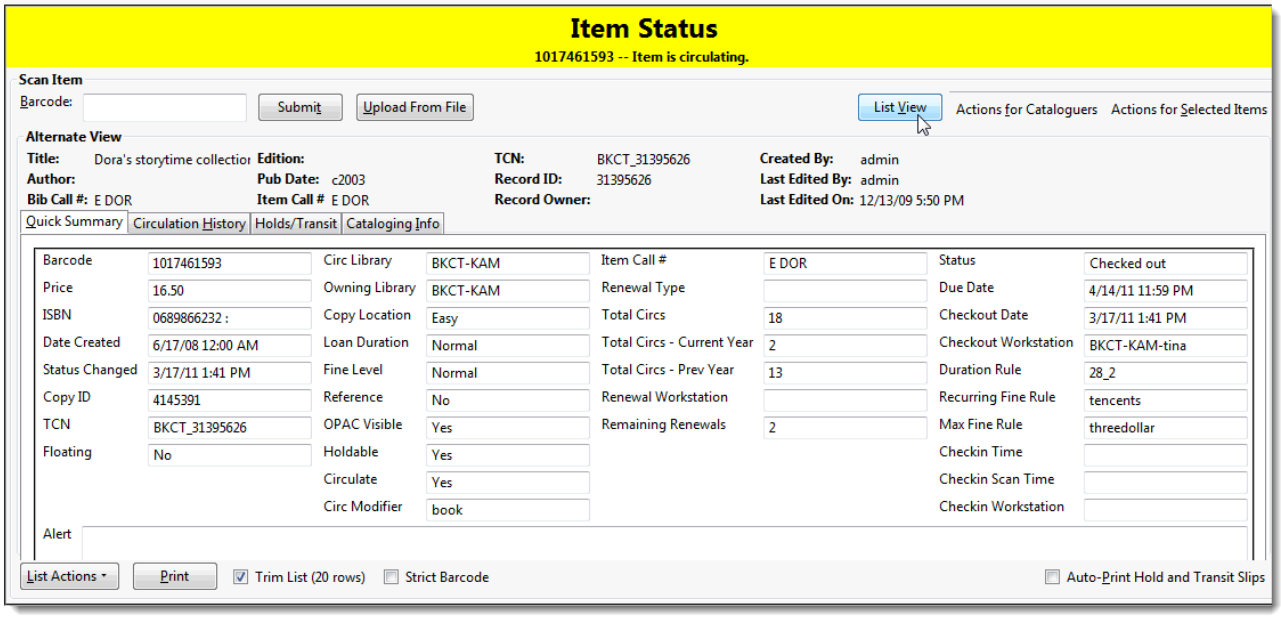
1. To check the status of an item, select *Search* → *Search for copies by Barcode* or *Circulation* → *Show Item Status by Barcode* , click on the *Item Status* button on circulation tool bar,or press **F5**. You can also click on barcode in copy summary view in catalogue to go directly to *Item Status* from the catalogue.



2. Scan the barcode or type it and click *Submit*. The current status of the item is displayed with selected other fields. You can use the column picker to select more fields to view.



3. Click the *Alternate View* button, and the item summary and circulation history will be displayed.



4. Click *List View* to go back.

If the item's status is "Available", the displayed due date refers to the previous circulation's due date.

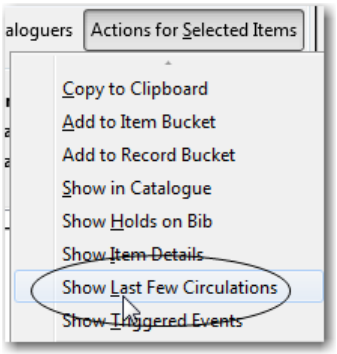
Upload From File allows you to load multiple items saved in a file on your local computer. The file contains a list of the barcodes in text format. To ensure smooth uploading and further processing on the items, it is recommended that the list contain no more than 100 items.

Sitka has a pre-defined list of copy statuses available. Please consult Section 49.3, “Copy Statuses” for the definition, as well as if the status makes the copy holdable or OPAC visible. Additional statuses will be added only after broader consultation with the Sitka community.

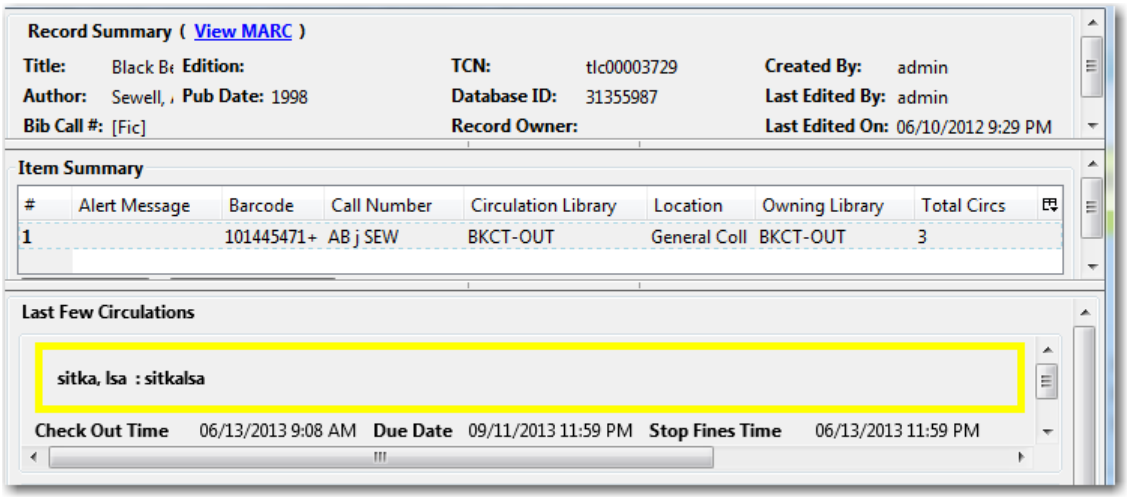
Viewing past circulations

1. To view past circulations, retrieve the item on the *Item Status* screen as described above.

2. Select *Actions for Selected Items* → *Show Last Few Circulations*.



3. The item's recent circulation history is displayed.


Record Summary (View MARC)
Title: Black Be Edition:
Author: Sewell, , Pub Date: 1998
Bib Call #: [Fic]
TCN: tlc00003729
Database ID: 31355987
Record Owner:
Created By: admin
Last Edited By: admin
Last Edited On: 06/10/2012 9:29 PM
Item Summary
Alert Message Barcode Call Number Circulation Library Location Owning Library Total Circs
1 101445471+ AB j SEW BKCT-OUT General Coll BKCT-OUT 3
Last Few Circulations
sitka, lsa : sitkalsa
Check Out Time 06/13/2013 9:08 AM Due Date 09/11/2013 11:59 PM Stop Fines Time 06/13/2013 11:59 PM

4. To retrieve the patron(s) of the last circulations, click the *Retrieve Last Patron* or the *Retrieve All These Patrons* button at the bottom of the above screen. Patron record(s) will be displayed in new tab(s).

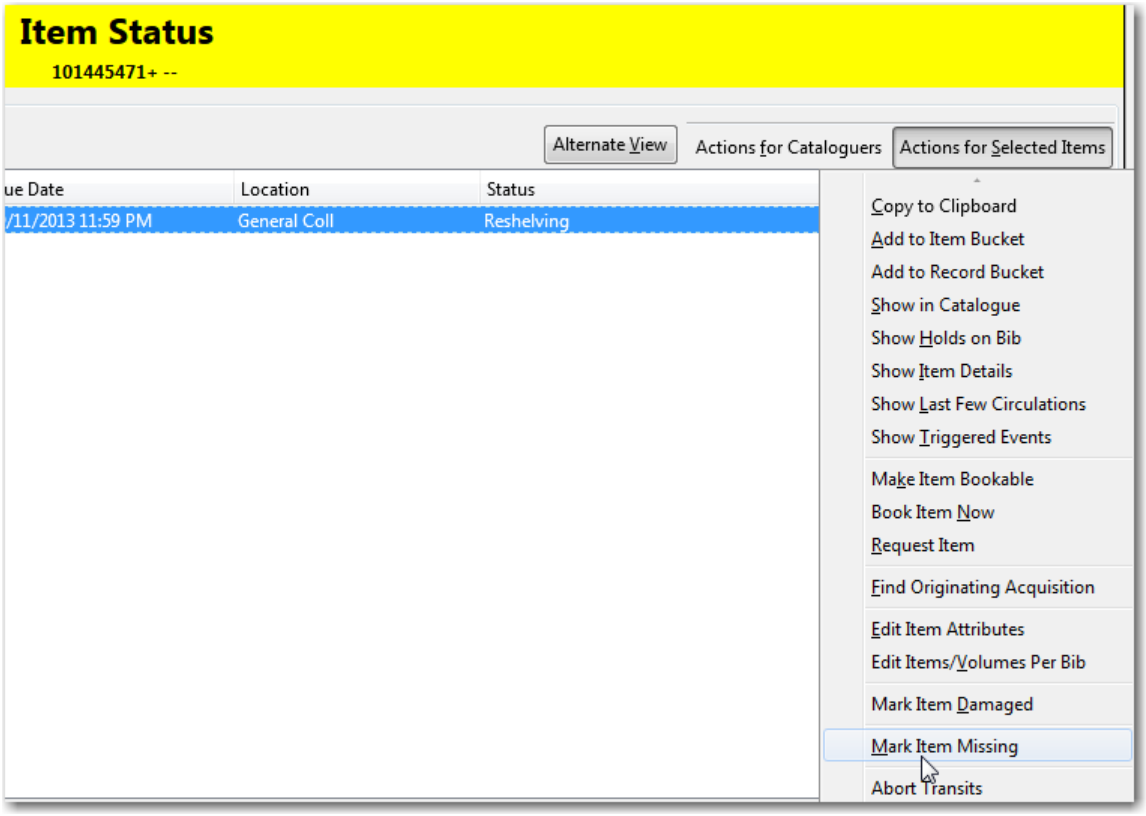
Each libary can determine its own number of past circulations to be displayed. See Chapter 48, *Local Administration Menu* for more information.

You can retrieve the past circulations on the patron's *Items Out* screen, too.

Marking items damaged or missing and other functions

1. To mark items damaged or missing, retrieve the item on the *Item Status* screen.

2. Select the item. Click on the *Actions for Selected Items* dropdown list and *Mark Item Damaged* or *Mark Item Missing.*



Depending on the library's policy, when marking an item damaged, bills (cost and/or processing fee) may be inserted into the last borrower's account. Overdue fines, if any, may be voided at the same time. See Chapter 48, *Local Administration Menu* for more information.

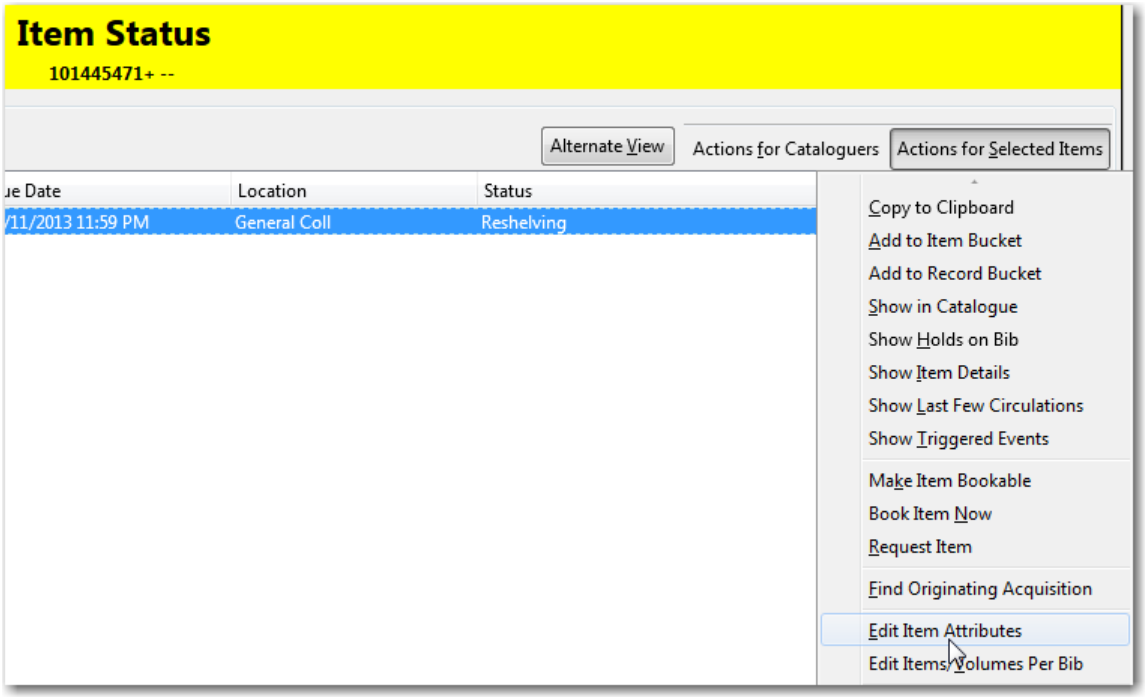
Following the above procedure, you can check in and renew items by using the *Check in Items* and *Renew Items* on the dropdown menu.

Item alerts

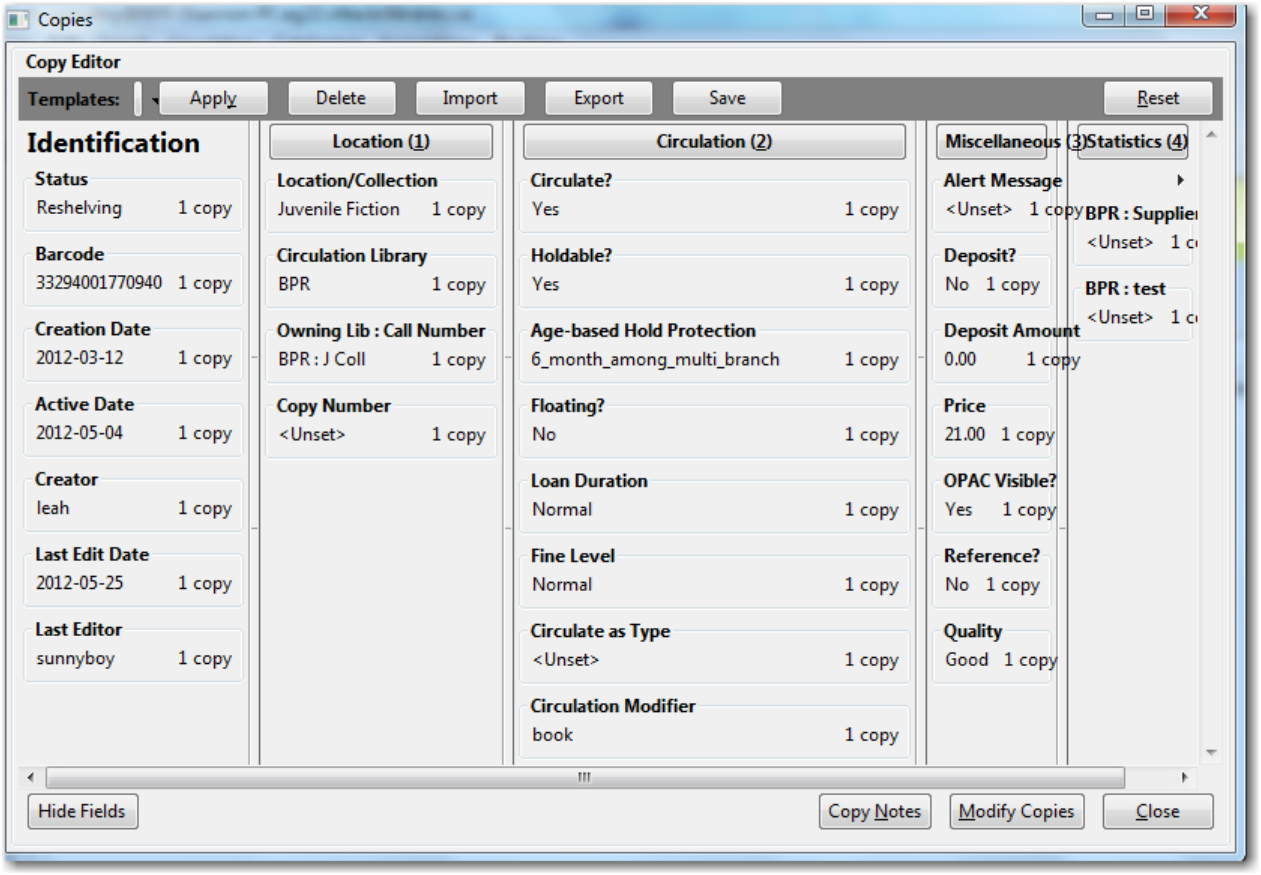
The *Edit Item Attributes* function on the *Actions for Selected Items* dropdown list allows you to edit item records. Here we will show you how to insert item alert messages by this function. See Part III, “Cataloguing” for more information on item editing.

1. Retrieve record on *Item Status* screen.

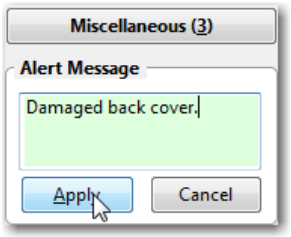
2. Once item is displayed, highlight it and select *Actions for Selected Items* → *Edit Item Attributes*.



3. The item record is displayed in the *Copy Editor*.



4. Click *Alert Message* in the *Miscellaneous* column. The background colour of the box changes. Type in the message then click *Apply*.



5. Click *Modify Copies*, then confirm the action.

7.7. Barcode Completion

Barcode completion is used to add prefixes, suffixes, and/or padding to a barcode when scanned. This is used when the physical barcode does not match the barcode saved in Evergreen. For example, all barcodes at a library may be prefixed in Evergreen with their Library and Archives Canada code MPL12345 but the physical barcode on the item is 12345. When barcode completion is in use Evergreen will add MPL to ever barcode scanned.

A short video on barcode completion can be found here.

Barcode completion is generally used in Sitka to handle duplicate item or patron barcodes.

Multiple Matches

Patron Barcodes

Item Barcodes

Multiple Matches

When a barcode is entered if multiple matches are found a pop-up will appear listing the possible barcodes.

Select the barcode/title or barcode/name combination that matches the item in your hand or the patron.

Barcode Choice
Barcode Choice
After auto completion multiple barcodes may match your input. Please choose the barcode you intended below.
Found Barcodes:
178532 : The Da Vinci code : a novel from Maple Library (MPL)
AHL178532 : Frogs from Ace Hill Library (BRL-AHL)
BRB178532 : The lion king from Bayridge Branch (BRL-BRB)
CBB178532 : Harry Potter and the deathly hallows from Cadillac Book Bus (BRL-CBB)
None of the above

If the barcode is not a 14 digit codebar barcode you may wish to re-barcode the item or issue the patron a new library card to prevent future pop-ups caused by that barcode.

Patron Barcodes

The barcode completion pop up will appear when a patron barcode is scanned in the following places:

- the *Barcode* field in the Retrieve Patron Check Out interface (*Circulation* → *Check Out Items*)
- the *Barcode* field in the Check Out section of the patron account.

  The library setting *Load patron from Checkout* must be set to *True*.
- the *Place hold for patron by barcode* field in the staff client catalogue.

The Barcode Completion pop up will not appear when a patron barcode is scanned into the *Barcode* field in the Patron Search interface.

Item Barcodes

The barcode completion pop up will appear when an item barcode is scanned in the following places:

- the *Barcode* field in the Check Out section of the patron account.

- the *Enter Barcode* field in the Check In interface.
- the *Barcode* field in the Item Status interface.

Chapter 8. Bills and Payments

8.1. Circulation vs. Grocery Bills

There are two types of bills in Sitka Evergreen: Circulation bills and Grocery bills. Circulation bills are system-generated, including overdue fines, lost item cost and processing fees, etc. Overdue fines are added daily once an item is overdue. The fine rates are determined by each library. When an item is marked as lost, bills may be automatically generated to cover the item's cost (price in the item record) and the processing fee. Each library can determine its own processing fee. See Chapter 48, *Local Administration Menu* for more information.

Grocery bills are manually created by staff. Grocery bill types can be shared by all Sitka libraries or created by an individual library. Default price can be attached to each bill type.

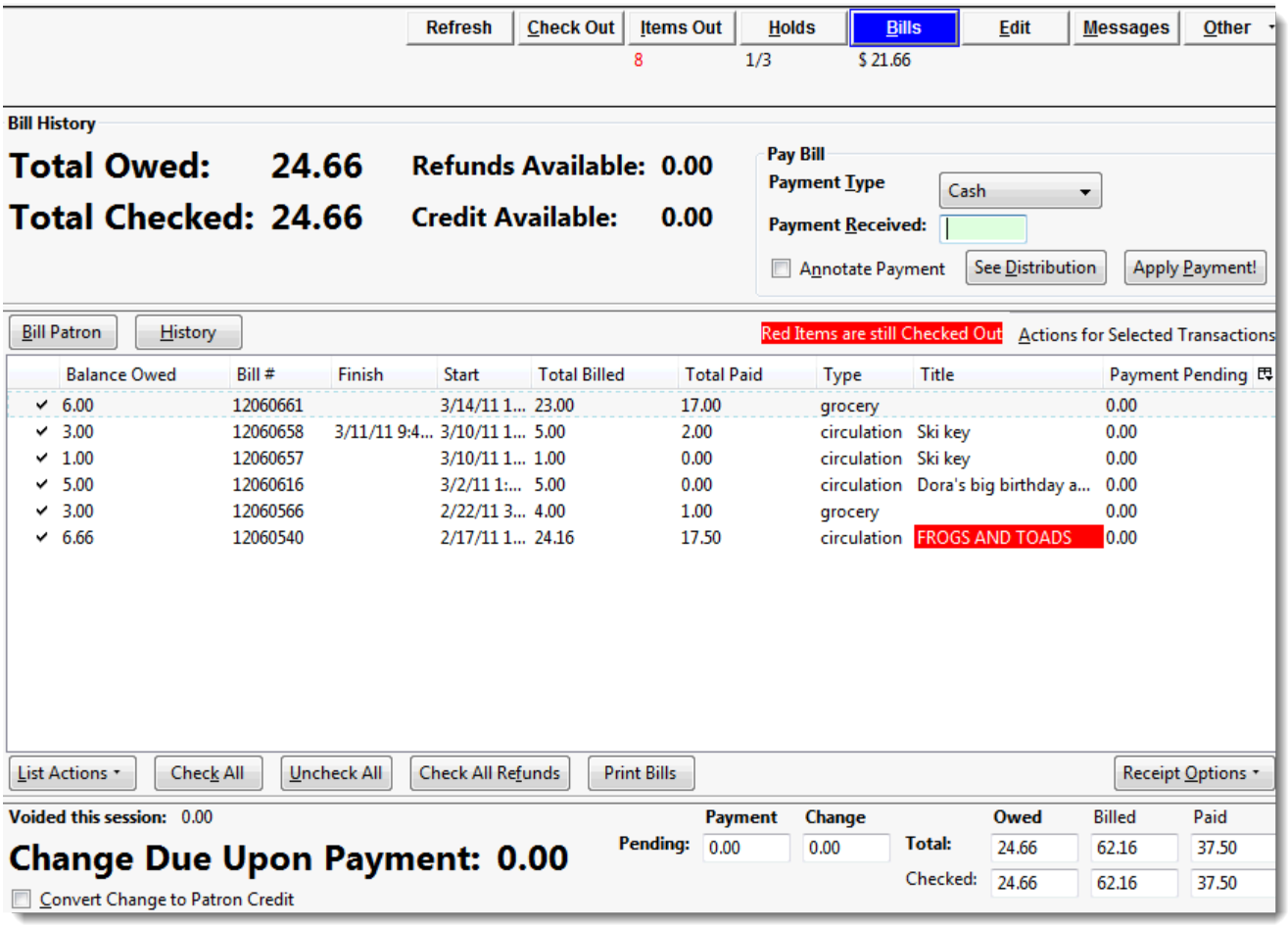
8.2. Making Payments

Bills can be paid by cash, check or credit in the patron account. Bills can also be resolved by forgiveness, work or goods, e.g. replacement copy. The following procedure shows how to collect payments.

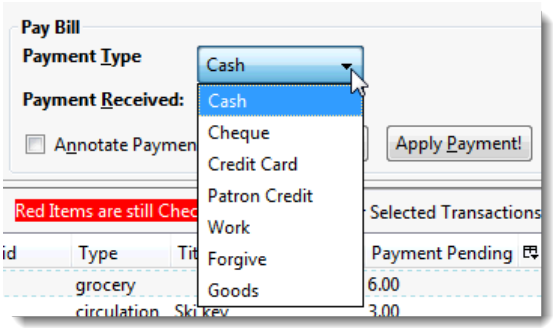
1. Retrieve patron and click on *Bills* button.

Based on your library's setting, *Bills* may be the default screen when retrieving a patron with bills. You can configure this screen by use of the *Column Picker* to display required data, and by selecting *List ActionsSave Column Configuration.*

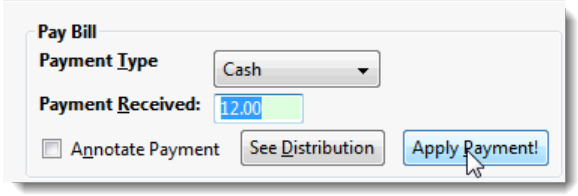
2. The bill screen opens.


Refresh
Check Out
Items Out
Holds
Bills
Edit
Messages
Other
8
1/3
$ 21.66
Bill History
Total Owed: 24.66
Total Checked: 24.66
Refunds Available: 0.00
Credit Available: 0.00
Pay Bill
Payment Type
Cash
Payment Received:
Annotate Payment
See Distribution
Apply Payment!
Bill Patron
History
Red Items are still Checked Out
Actions for Selected Transactions
Balance Owed | Bill # | Finish | Start | Total Billed | Total Paid | Type | Title | Payment Pending
6.00 | 12060661 | | 3/14/11 1... | 23.00 | 17.00 | grocery | | 0.00
3.00 | 12060658 | 3/11/11 9:4... | 3/10/11 1... | 5.00 | 2.00 | circulation | Ski key | 0.00
1.00 | 12060657 | | 3/10/11 1... | 1.00 | 0.00 | circulation | Ski key | 0.00
5.00 | 12060616 | | 3/2/11 1:... | 5.00 | 0.00 | circulation | Dora's big birthday a... | 0.00
3.00 | 12060566 | | 2/22/11 3... | 4.00 | 1.00 | grocery | | 0.00
6.66 | 12060540 | | 2/17/11 1... | 24.16 | 17.50 | circulation | FROGS AND TOADS | 0.00
List Actions
Check All
Uncheck All
Check All Refunds
Print Bills
Receipt Options
Voided this session: 0.00
Change Due Upon Payment: 0.00
Convert Change to Patron Credit
Payment
Change
Owed
Billed
Paid
Pending: 0.00 0.00
Total: 24.66 62.16 37.50
Checked: 24.66 62.16 37.50

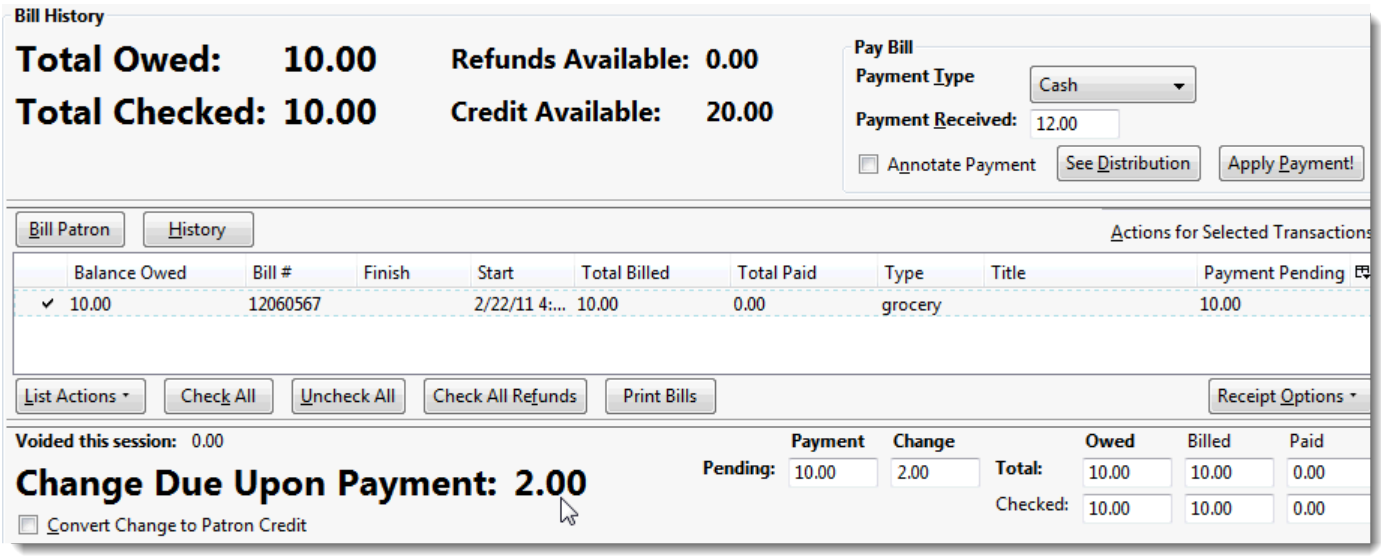
3. Select the payment type from the drop down menu.



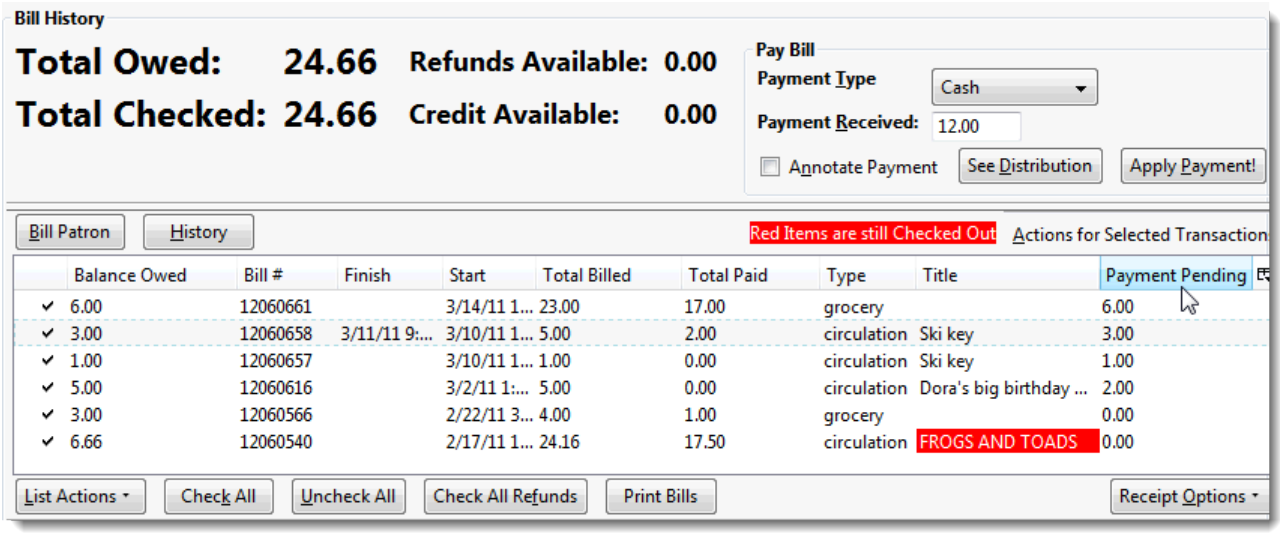
4. Enter the amount of payment in the *Payment Received* field and click *Apply Payment*.



5. Change, if any, is displayed at the bottom of the screen as *Change Due Upon Payment*. It can be converted to patron credit by selecting the *Convert to Patron Credit* checkbox.

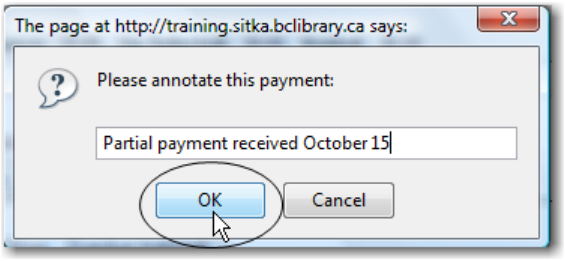


6. When partial payment is made, the money applied starts at the top of the list of checked bills. Click the *See Distribution* button, and the payment distribution will be displayed in the *Payment Pending* column. To pay selected bill(s), uncheck the other bills. Note the presence of the *Uncheck All* and *Check All* options as shortcuts.



Items marked with red are still checked out. It is possible for a patron to pay a bill while the item is still out and accruing fines.

You may choose to annotate the payment and fill in the resulting text box as required.



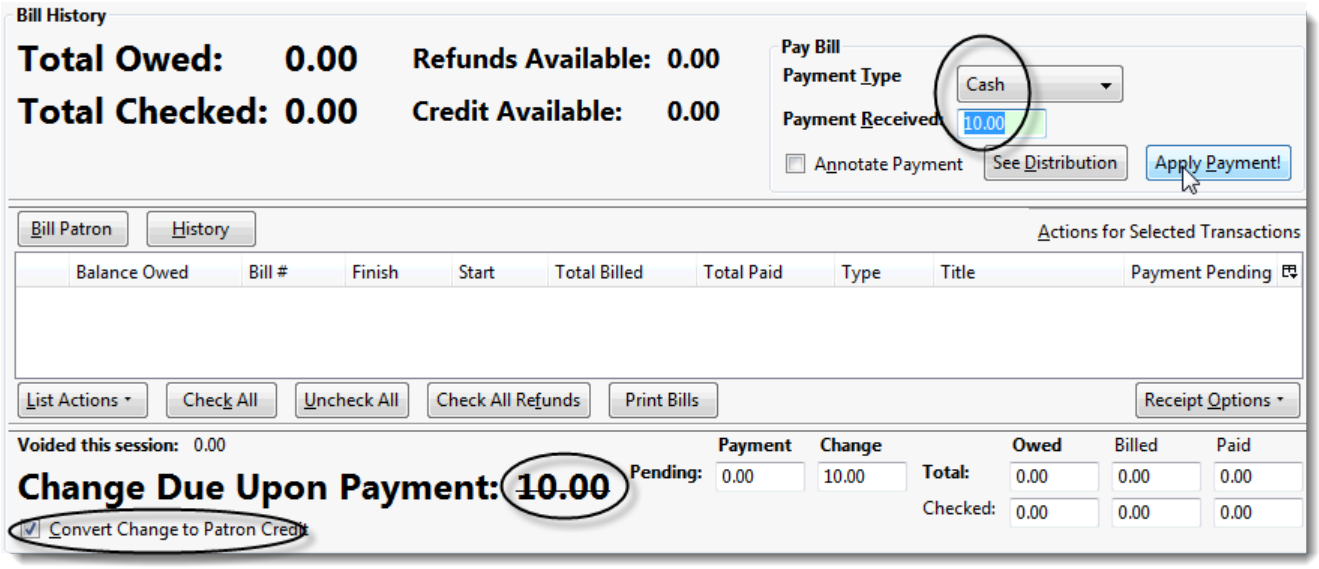
Using the *Receipt Options* button at the right bottom corner, you may request Evergreen to print or not print receipts. You can also specify the number of copies of receipts.

Void vs. Forgive: Void clears all history of the bill, while forgive retains the history. Use void when the bill should not be generated, e.g. a bill for a lost book that has been found. Forgive payments are displayed in the Cash Report.

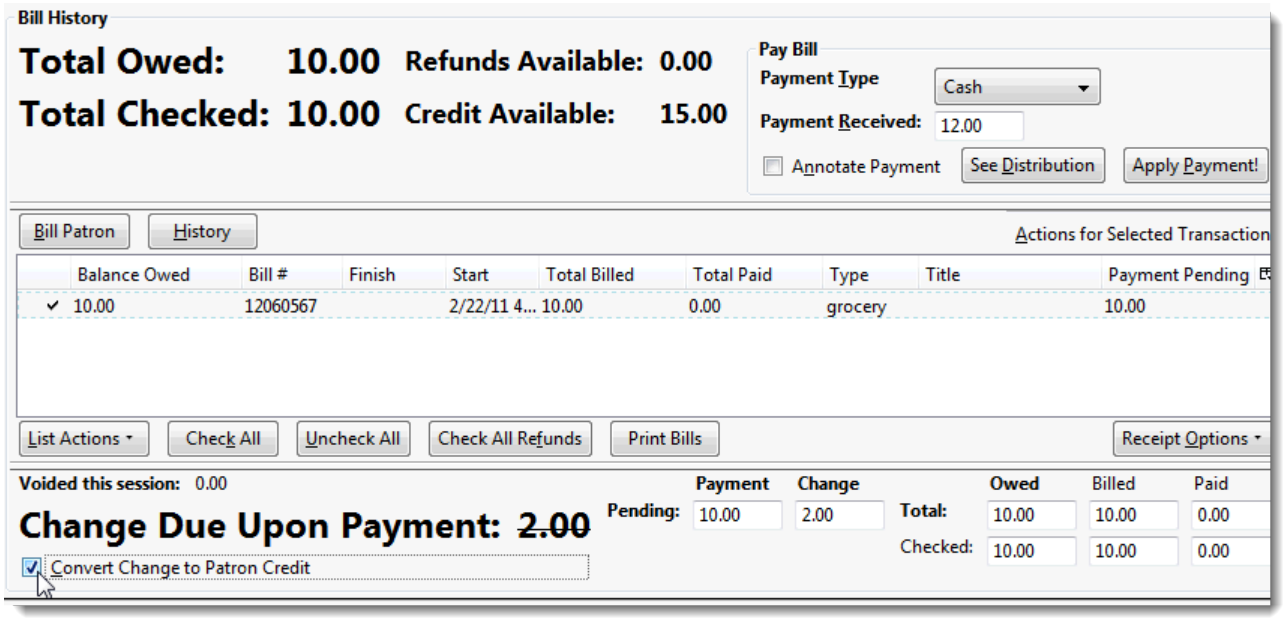
8.3. Patron Credit

A credit can be kept in a patron account and later used to pay bills.

To create or add a credit, on the *Bills* screen, select the payment method, type in the amount, select *Convert Change to Patron Credit* box at the bottom, then click *Apply Payment*.



Change from payment can also be converted to credit.

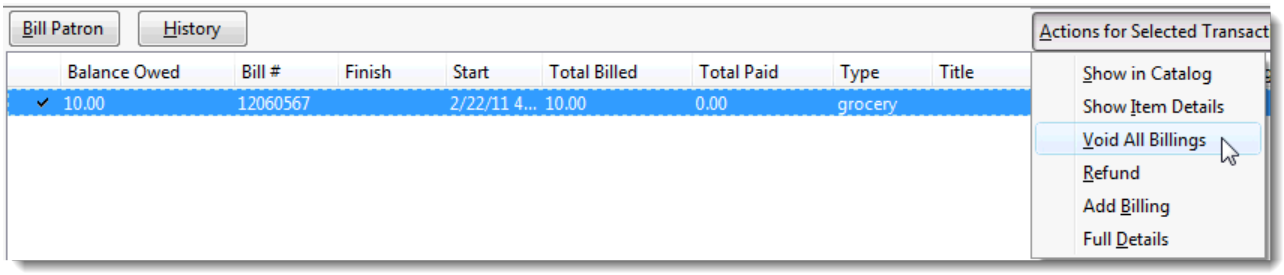


To use patron credit to pay bills, select *Patron Credit* as the payment type.

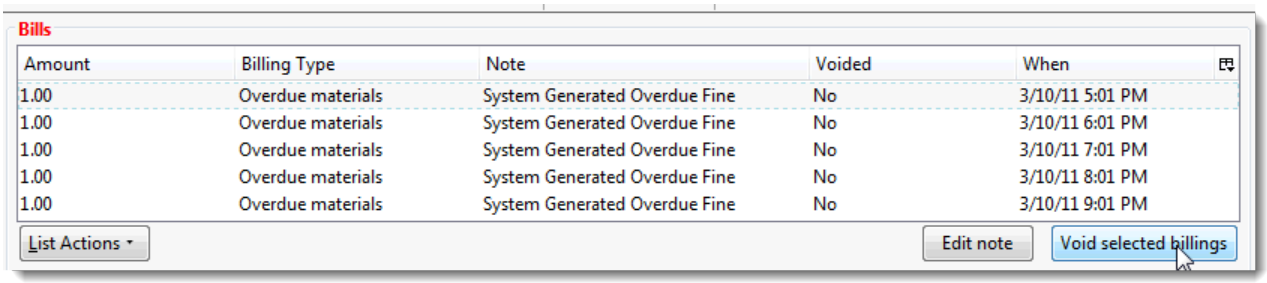
If your library chooses not to use Patron Credit, you may turn it off through a library setting. See Chapter 48, *Local Administration Menu* for more information.

8.4. Voiding Bills

All bills under one transaction are grouped under one bill line. You can void the whole amount or partial amount only. To void the whole amount, select the bill line and click *Actions for Selected Transactions* → *Void All Billings* and click *Yes* when asked to confirm.



To void a partial amount, select the bill, click *Actions for Selected Transactions* → *Full Details*. On bill details screen, select the bill you want to void, and click *Void Selected Billings*. Confirm your action.



You cannot partially void one billing line on the bill details screen. A billing line is the minimum bill unit.

Edit Note allows you to edit/create a note. For system-generated bills, we recommend you append your message.

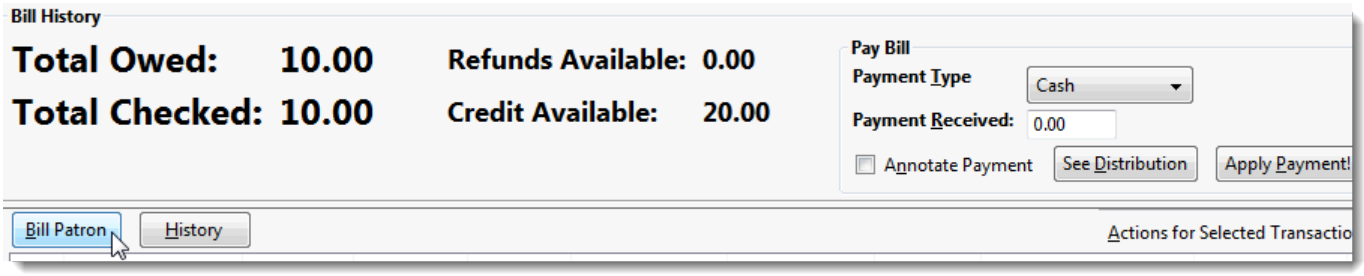
8.5. Adding New "Grocery" Bills

A grocery bill can be added as a new bill or to an existing bill.

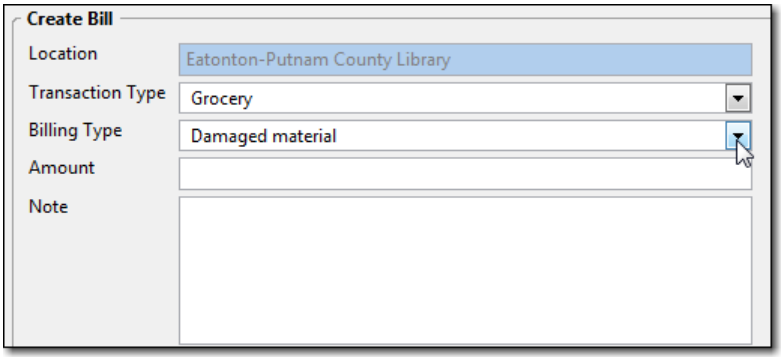
To add a grocery bill as a new bill:

1. Retrieve the patron record and select *Bills*.

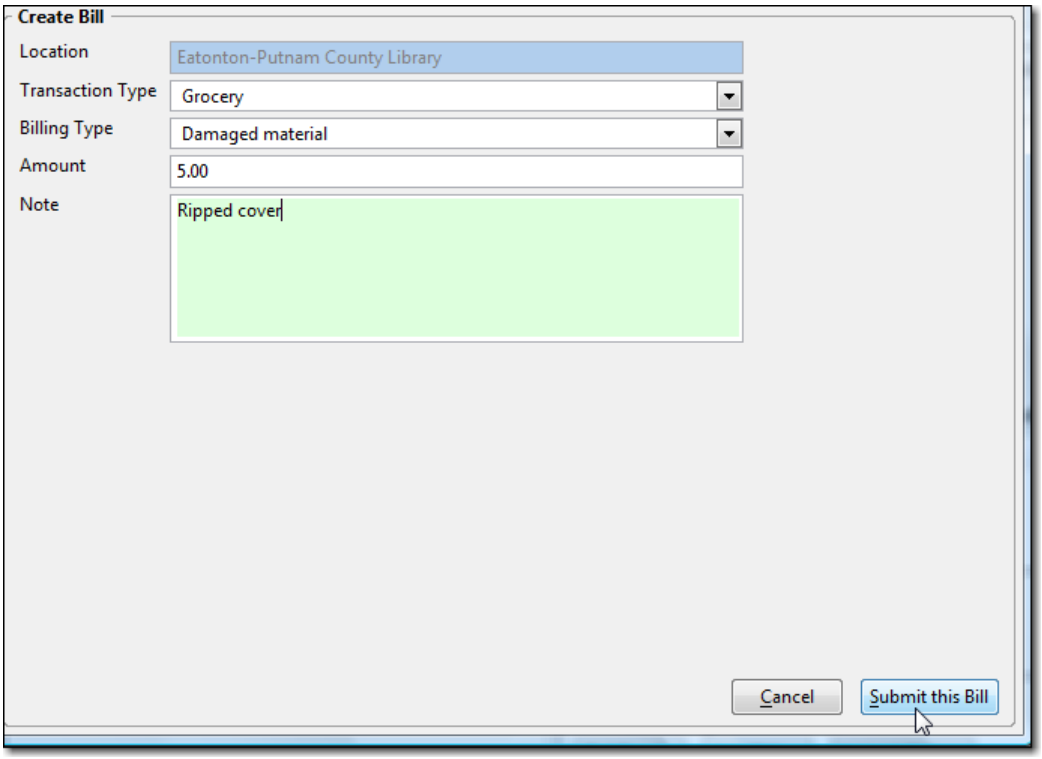
2. Select *Bill Patron*.



3. Grocery is the only available transaction type. Choose appropriate billing type from the drop down menu.



4. Enter amount in *Amount* field and any required note in *Note* field. Click *Submit this Bill*, and then confirm it.

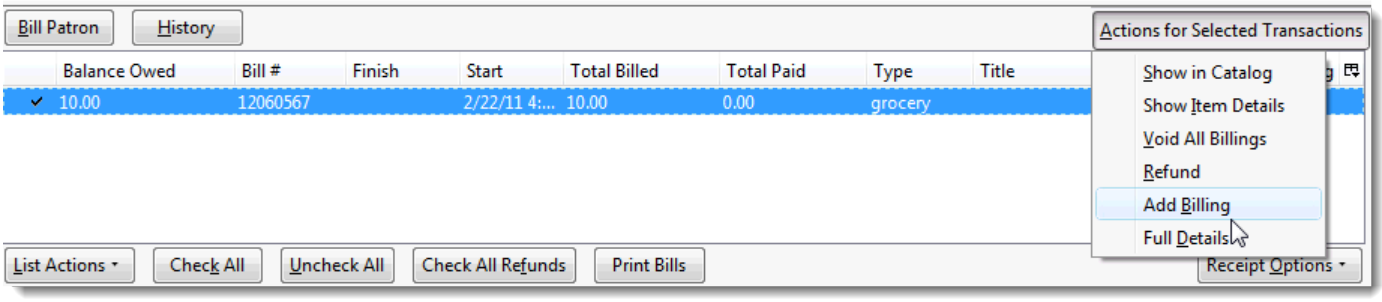


Local bill types may have a pre-set amount.

To add a grocery bill to an existing bill line:

1. Retrieve the patron record and go to the *Bills* screen.

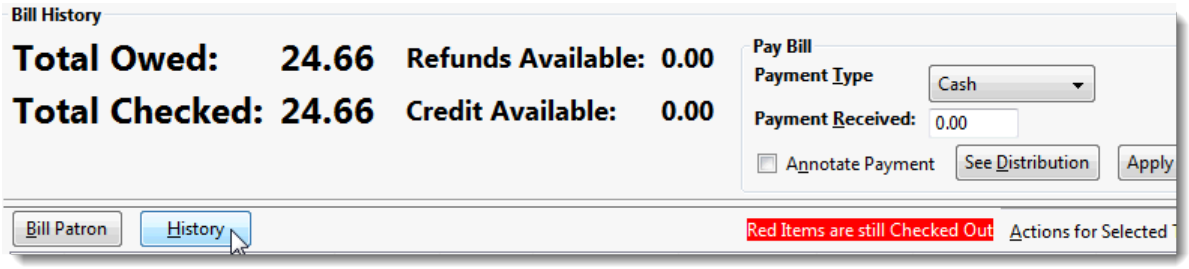
2. Select the bill to which you want to add, and click *Actions for Selected Transactions* → *Add Billing*. Click *Yes* on the confirmation prompt.



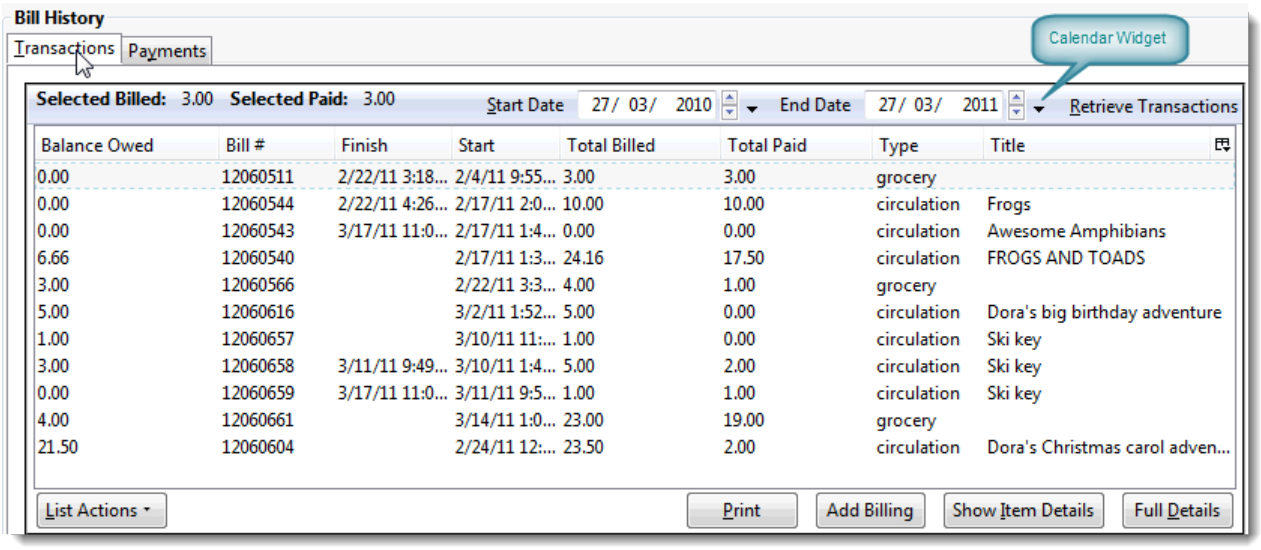
3. Follow steps 3 - 5 in Section 8.5, “Adding New "Grocery" Bills” to select billing type, fill in amount and note, if required, then submit the bill.

8.6. Bill History

1. To view a patron's bill history, retrieve the patron record and go to the *Bills* screen, and then click *History*.



2. On *Bill History*, you can view all bills or bills incurred in a specified time frame. You can use the calendar widgets to specify the *Start Date* and *End Date*, and then click *Retrieve Transactions*.

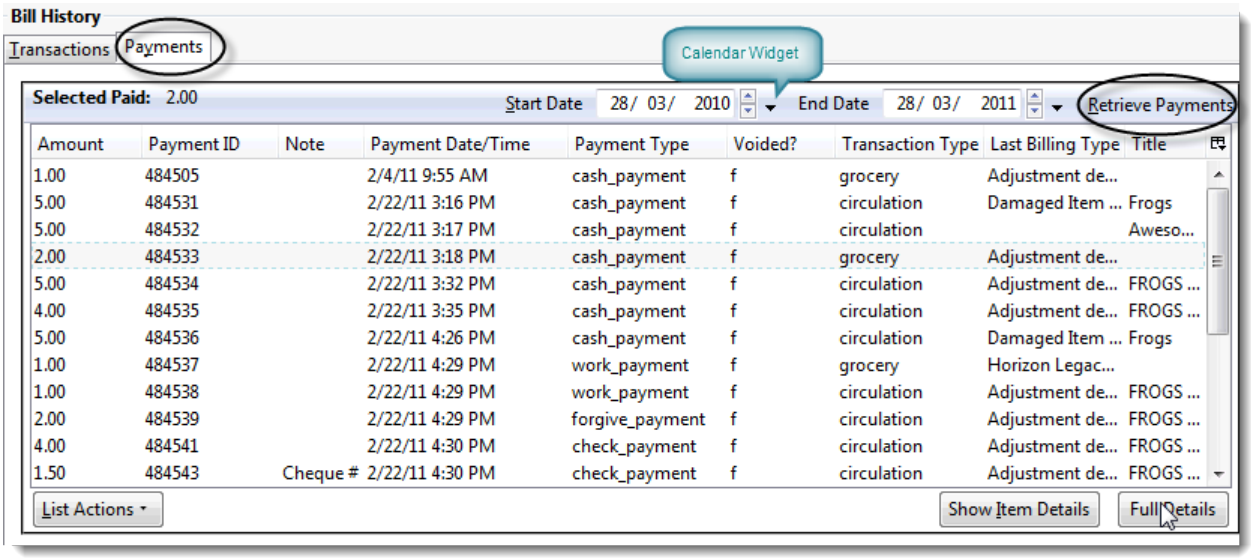

Bill History
Transactions
Payments
Calendar Widget
Selected Billed: 3.00
Selected Paid: 3.00
Start Date 27/ 03/ 2010
End Date 27/ 03/ 2011
Retrieve Transactions
Balance Owed | Bill # | Finish | Start | Total Billed | Total Paid | Type | Title
0.00 | 12060511 | 2/22/11 3:18... | 2/4/11 9:55... | 3.00 | 3.00 | grocery |
0.00 | 12060544 | 2/22/11 4:26... | 2/17/11 2:0... | 10.00 | 10.00 | circulation | Frogs
0.00 | 12060543 | 3/17/11 11:0... | 2/17/11 1:4... | 0.00 | 0.00 | circulation | Awesome Amphibians
6.66 | 12060540 | | 2/17/11 1:3... | 24.16 | 17.50 | circulation | FROGS AND TOADS
3.00 | 12060566 | | 2/22/11 3:3... | 4.00 | 1.00 | grocery |
5.00 | 12060616 | | 3/2/11 1:52... | 5.00 | 0.00 | circulation | Dora's big birthday adventure
1.00 | 12060657 | | 3/10/11 11:... | 1.00 | 0.00 | circulation | Ski key
3.00 | 12060658 | 3/11/11 9:49... | 3/10/11 1:4... | 5.00 | 2.00 | circulation | Ski key
0.00 | 12060659 | 3/17/11 11:0... | 3/11/11 9:5... | 1.00 | 1.00 | circulation | Ski key
4.00 | 12060661 | | 3/14/11 1:0... | 23.00 | 19.00 | grocery |
21.50 | 12060604 | | 2/24/11 12:... | 23.50 | 2.00 | circulation | Dora's Christmas carol adven...
List Actions
Print
Add Billing
Show Item Details
Full Details

3. For more information about a particular bill, you can select the bill on the list and click *Full Details* at the bottom of the above screen and the bill details are displayed in a pop-up window.

4. You may add a bill entry to an existing bill. Highlight the bill, then click *Add Billing* button at the bottom of the above screen.

On the *Bill History* screen, you can also view payments by selecting the *Payments* tab. You can view all payments or payments made within a time frame.

To view the details of a particular payment, highlight the line and click the *Full Details* button at the bottom.

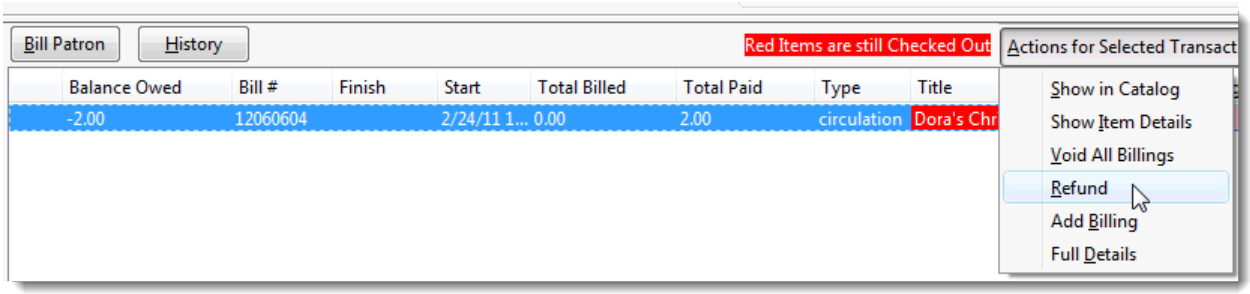

Bill History
Transactions
Payments
Calendar Widget
Selected Paid: 2.00
Start Date 28/ 03/ 2010
End Date 28/ 03/ 2011
Retrieve Payments
Amount | Payment ID | Note | Payment Date/Time | Payment Type | Voided? | Transaction Type | Last Billing Type | Title
1.00 | 484505 | | 2/4/11 9:55 AM | cash_payment | f | grocery | Adjustment de... |
5.00 | 484531 | | 2/22/11 3:16 PM | cash_payment | f | circulation | Damaged Item ... | Frogs
5.00 | 484532 | | 2/22/11 3:17 PM | cash_payment | f | circulation | | Aweso...
2.00 | 484533 | | 2/22/11 3:18 PM | cash_payment | f | grocery | Adjustment de... |
5.00 | 484534 | | 2/22/11 3:32 PM | cash_payment | f | circulation | Adjustment de... | FROGS ...
4.00 | 484535 | | 2/22/11 3:35 PM | cash_payment | f | circulation | Adjustment de... | FROGS ...
5.00 | 484536 | | 2/22/11 4:26 PM | cash_payment | f | circulation | Damaged Item ... | Frogs
1.00 | 484537 | | 2/22/11 4:29 PM | work_payment | f | grocery | Horizon Legac... |
1.00 | 484538 | | 2/22/11 4:29 PM | work_payment | f | circulation | Adjustment de... | FROGS ...
2.00 | 484539 | | 2/22/11 4:29 PM | forgive_payment | f | circulation | Adjustment de... | FROGS ...
4.00 | 484541 | | 2/22/11 4:30 PM | check_payment | f | circulation | Adjustment de... | FROGS ...
1.50 | 484543 | Cheque # | 2/22/11 4:30 PM | check_payment | f | circulation | Adjustment de... | FROGS ...
List Actions
Show Item Details
Full Details

Items can be deleted from the catalogue even if a charge for that item is still attached to the patron's record. The charge will remain on the patron's account after the deletion.

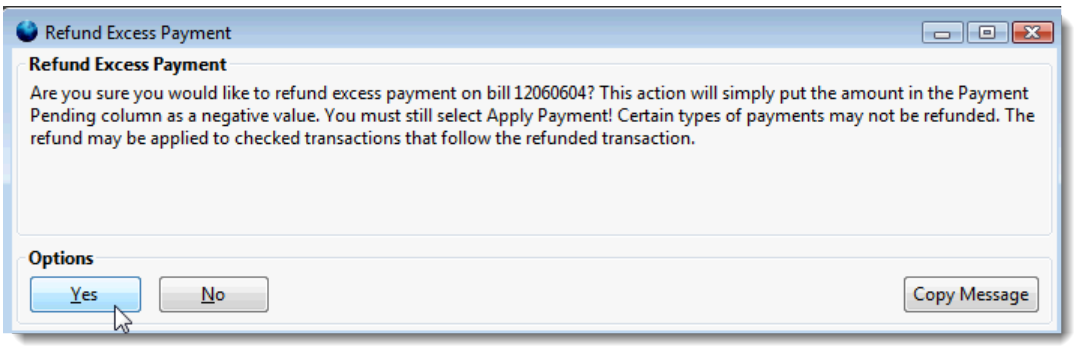
8.7. Refund

Sometimes paid bills need to be voided, such as when lost and paid items are returned. A negative balance may be created once such bills are voided. To close such bills, staff may refund the balance amount or add a bill entry.

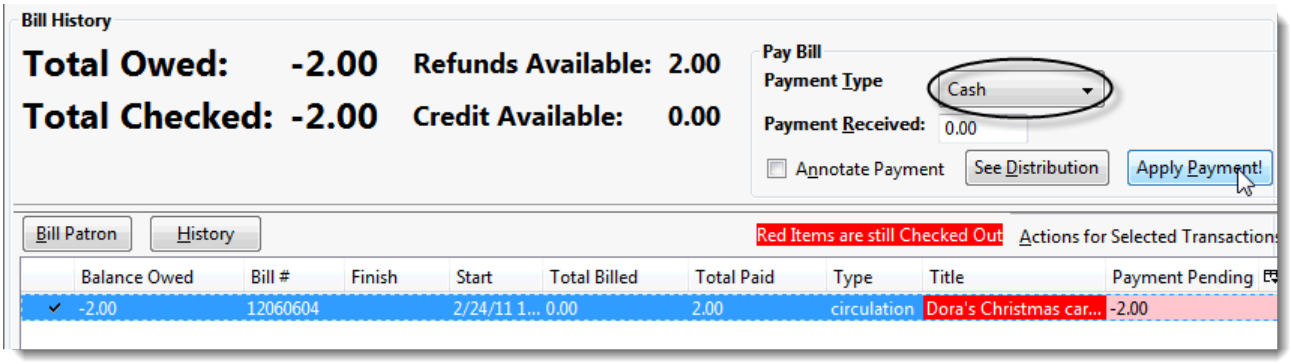
1. To refund, select the bill on the *Bills* screen. Click *Actions for Selected Transactions* → *Refund*.


Bill Patron
History
Red Items are still Checked Out
Actions for Selected Transact
Balance Owed | Bill # | Finish | Start | Total Billed | Total Paid | Type | Title
-2.00 | 12060604 | | 2/24/11 1... | 0.00 | 2.00 | circulation | Dora's Chr
Show in Catalog
Show Item Details
Void All Billings
Refund
Add Billing
Full Details

2. Read the instructions and confirm.


Refund Excess Payment
Refund Excess Payment
Are you sure you would like to refund excess payment on bill 12060604? This action will simply put the amount in the Payment Pending column as a negative value. You must still select Apply Payment! Certain types of payments may not be refunded. The refund may be applied to checked transactions that follow the refunded transaction.
Options
Yes
No
Copy Message

3. Select payment type and click *Apply Payment*.



4. Refund can be converted to patron credit by selecting Patron Credit as payment type.

> Refunds are reflected in the Cash Report.
>
> Non-cash payment can not be refunded.

Chapter 9. Holds

9.1. Placing Holds

Holds can be placed by staff on the Staff Client and by patrons on the OPAC. In this chapter we demonstrate placing holds on the Staff Client. See Part IV, “OPAC” for placing holds on the OPAC.

Holds Levels

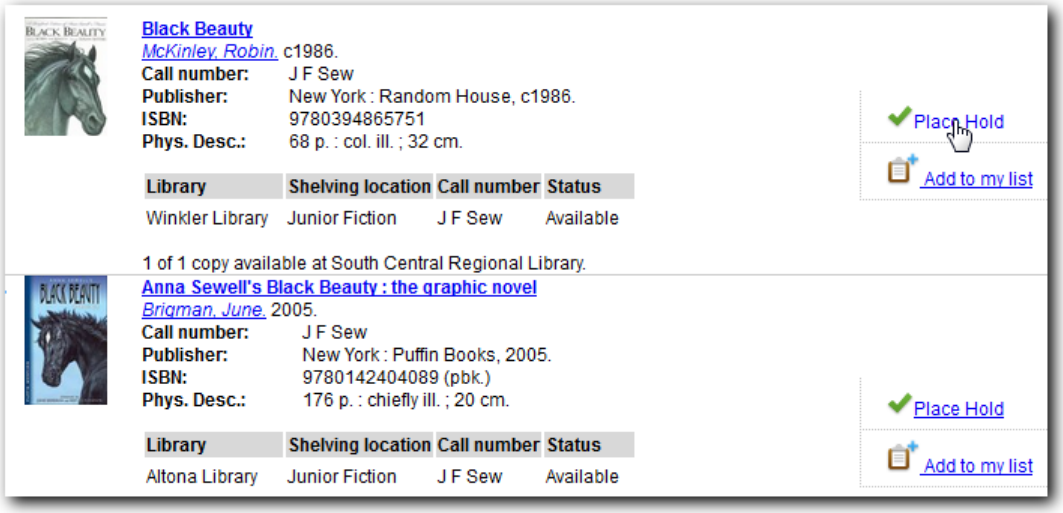
Evergreen has four different levels of holds. Library staff can place holds at all four levels, while patrons can only place Meta-record,Title-level, and Volume-level holds.

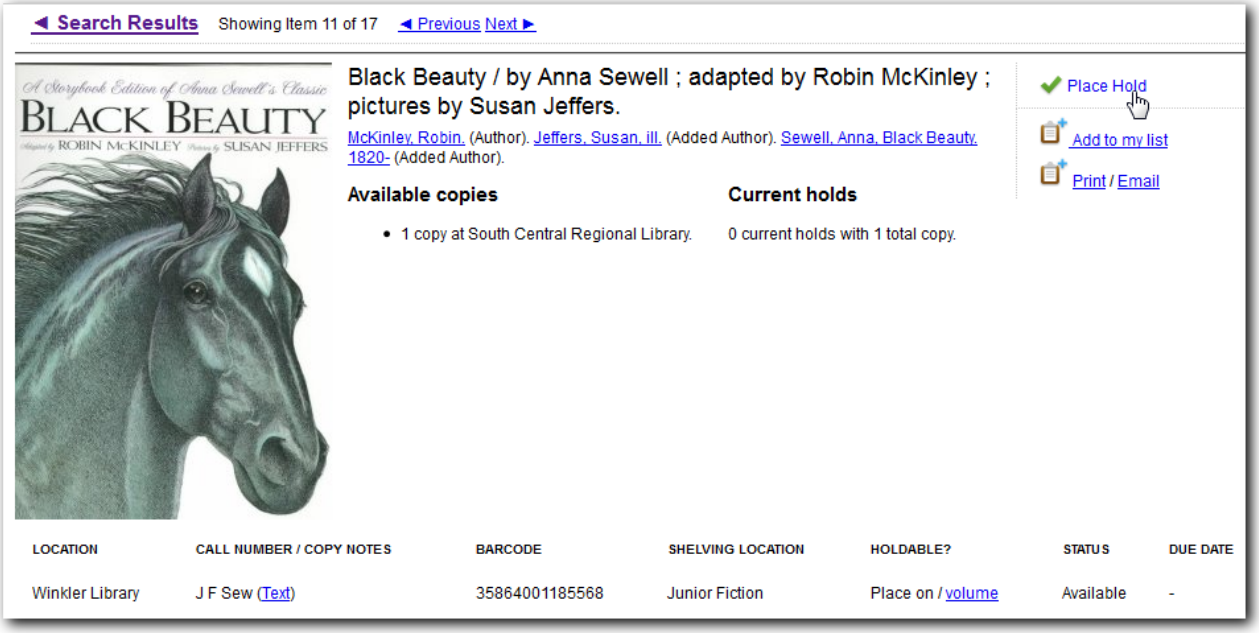
The chart below summarizes the four levels of holds.

Hold level	Abbreviation	When to use	How to use	Who can use	Hold tied to
Meta-record	M	Patron wants first available copy of multiple titles of the same/different format	Click on *place hold* to the right of the record. From holds confirmation screen, click *Advanced hold options* and select other applicable formats.	Patron or staff	Holdings attached to multiple MARC (title) records sharing the same title and author of selected format(s) (book, video, audiobook, etc.)
Title	T	Patron wants first available copy of a title	Staff or patron click on *place hold* to the right of a record on search result list or record summary screen.	Patron or staff	Holdings attached to a single MARC (title) record
Volume	V	Patrons want the first available copy of a specific volume (call number) of a title	Staff or patron click *Volume* in *HOLDABLE?* column on the holdings grid on record summary screen.	Patron or staff	Call number specific volume record (local call number resides in volume record)
Copy	C	Patron or staff want a specific copy of a title	Staff click *details* to view barcode then *place hold* next to that barcode.	Staff	Item barcode

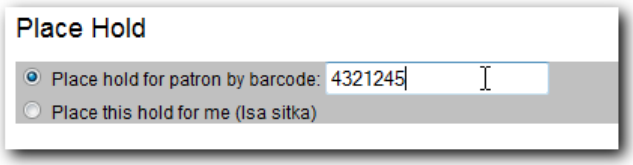
Title Level Hold

1. To place a title level hold, retrieve the title record on the catalogue and click the *Place Hold* button to the right of the record on the search result list, or record summary screen.

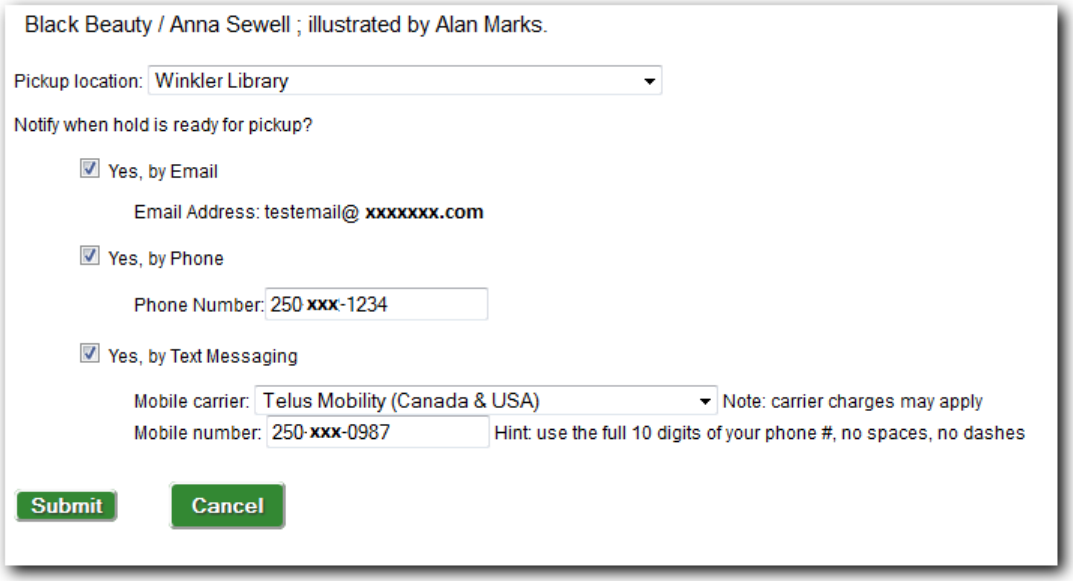

Black Beauty
McKinley, Robin. c1986.
Call number: J F Sew
Publisher: New York : Random House, c1986.
ISBN: 9780394865751
Phys. Desc.: 68 p. : col. ill. ; 32 cm.
Library | Shelving location | Call number | Status
Winkler Library | Junior Fiction | J F Sew | Available
1 of 1 copy available at South Central Regional Library.
Place Hold
Add to my list
Anna Sewell's Black Beauty : the graphic novel
Brigman, June. 2005.
Call number: J F Sew
Publisher: New York : Puffin Books, 2005.
ISBN: 9780142404089 (pbk.)
Phys. Desc.: 176 p. : chiefly ill. ; 20 cm.
Library | Shelving location | Call number | Status
Altona Library | Junior Fiction | J F Sew | Available
Place Hold
Add to my list


Search Results
Showing Item 11 of 17
Previous Next
Black Beauty / by Anna Sewell ; adapted by Robin McKinley ; pictures by Susan Jeffers.
McKinley, Robin. (Author). Jeffers, Susan, ill. (Added Author). Sewell, Anna. Black Beauty. 1820- (Added Author).
Available copies
1 copy at South Central Regional Library.
Current holds
0 current holds with 1 total copy.
Place Hold
Add to my list
Print / Email
LOCATION | CALL NUMBER / COPY NOTES | BARCODE | SHELVING LOCATION | HOLDABLE? | STATUS | DUE DATE
Winkler Library | J F Sew (Text) | 35864001185568 | Junior Fiction | Place on / volume | Available | -

2. Scan or type patron's barcode into *Place hold for patron by barcode*, and then tab or move the cursor out of the box.



3. Edit patron hold notification methods and pickup location, if necessary, and click *Submit*.


Black Beauty / Anna Sewell ; illustrated by Alan Marks.
Pickup location: Winkler Library
Notify when hold is ready for pickup?
Yes, by Email
Email Address: testemail@ xxxxxxx.com
Yes, by Phone
Phone Number: 250 xxx-1234
Yes, by Text Messaging
Mobile carrier: Telus Mobility (Canada & USA)
Note: carrier charges may apply
Mobile number: 250 xxx-0987
Hint: use the full 10 digits of your phone #, no spaces, no dashes
Submit
Cancel

4. Click *Continue*, or *Cancel* if the hold failed, to go back to search result.

In step 2, checking the *Place this hold for me* radio button will set the login staff as the hold requester. If this is your personal account, you can use this button to place holds for yourself.

A default hold expiration date will be recorded if the libary has set up a default holds expiration period in their library settings. See Chapter 48, *Local Administration Menu*. Uncaptured holds will not be targeted after expiration date. To view and edit the expiration date, go to *Holds* under *My Account*.

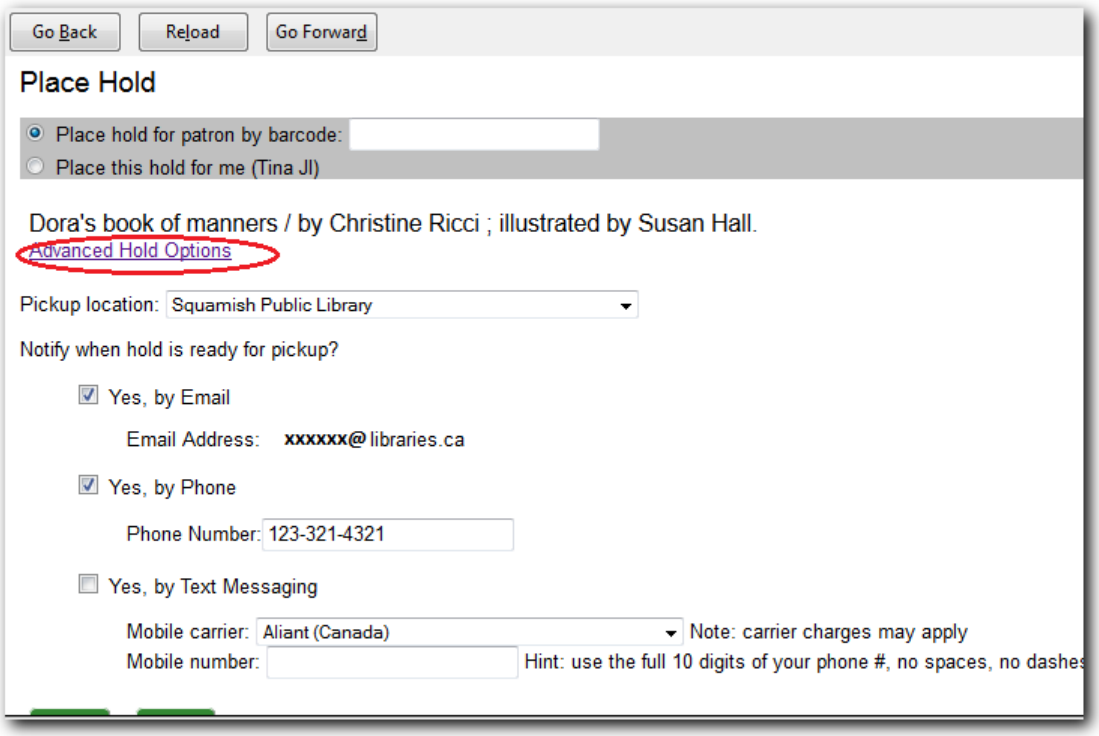
Meta-record Level Hold

There are two ways of placing meta-record holds:

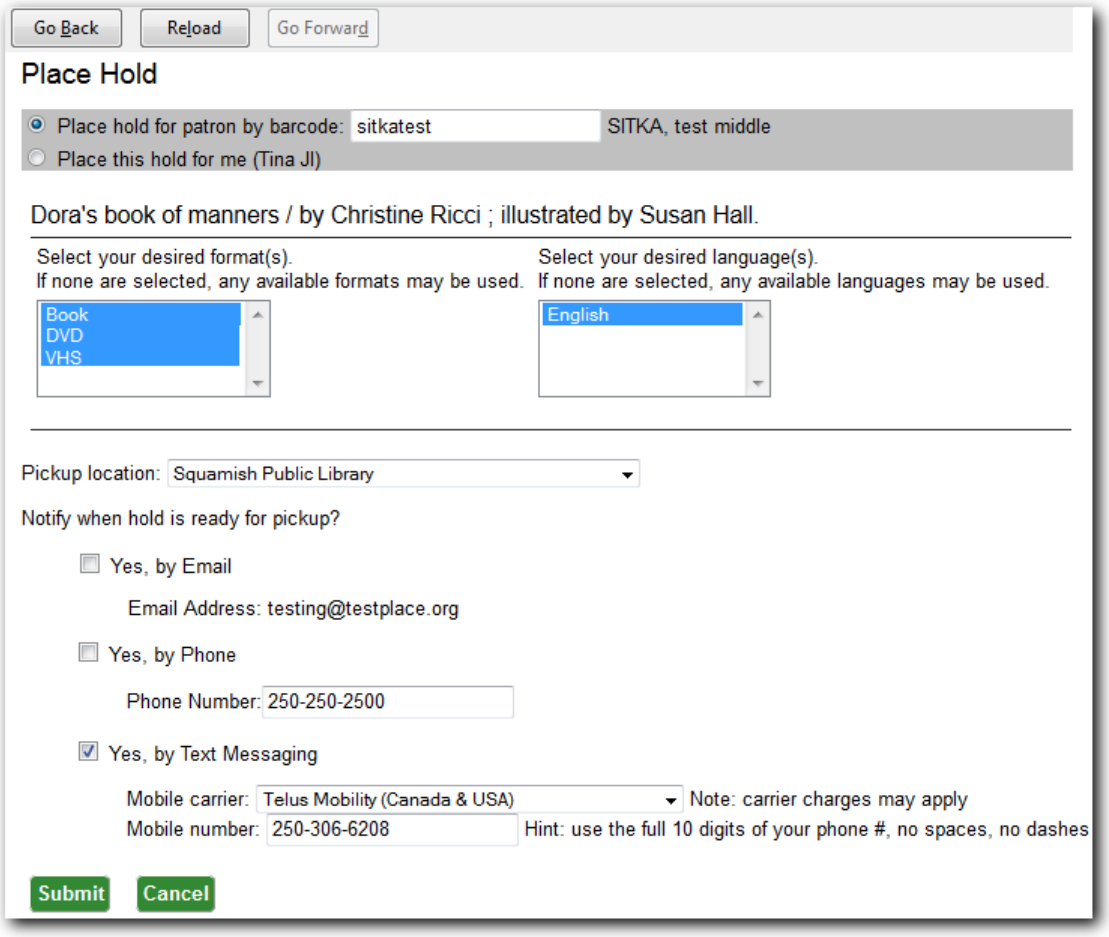
Using *Advanced Holds Options* button

1. To place a Meta-record level hold, do a regular search for the title. Click *Place Hold* link on either the result list or record details screen, shown as step 1 in the section called “Title Level Hold”.

2. Click *Advanced Holds Options* under the title.

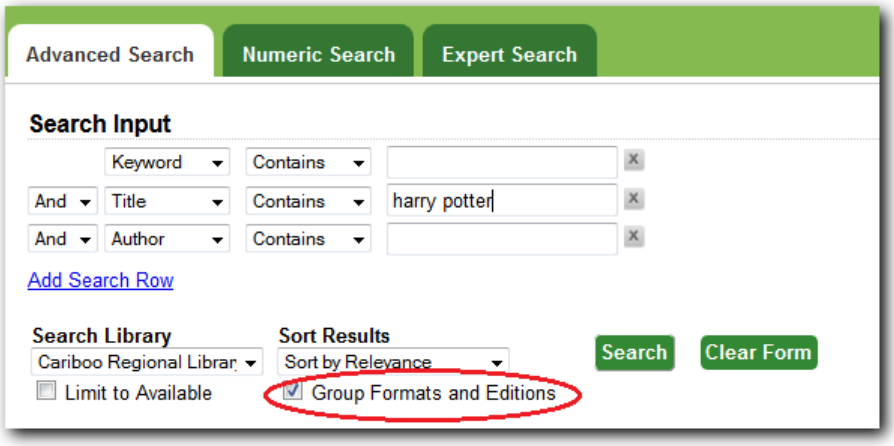

Go Back
Reload
Go Forward
Place Hold
Place hold for patron by barcode:
Place this hold for me (Tina JI)
Dora's book of manners / by Christine Ricci ; illustrated by Susan Hall.
Advanced Hold Options
Pickup location: Squamish Public Library
Notify when hold is ready for pickup?
Yes, by Email
Email Address: xxxxxx@libraries.ca
Yes, by Phone
Phone Number: 123-321-4321
Yes, by Text Messaging
Mobile carrier: Aliant (Canada)
Note: carrier charges may apply
Mobile number:
Hint: use the full 10 digits of your phone #, no spaces, no dashes

3. Scan patron's barcode. Select the acceptable format(s) and language(s). Edit patron hold notification methods and/or pickup location, if required. Click *Submit* button.

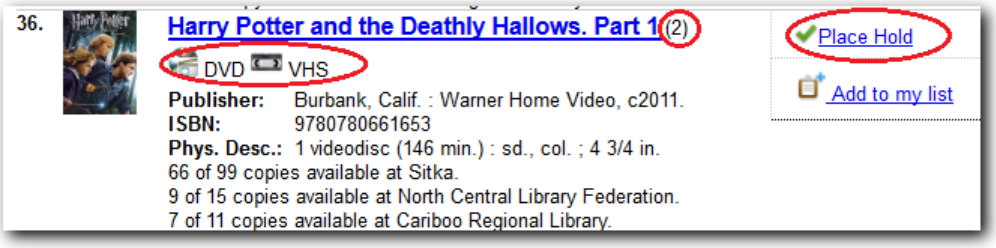

Go Back
Reload
Go Forward
Place Hold
Place hold for patron by barcode: sitkatest
SITKA, test middle
Place this hold for me (Tina Jl)
Dora's book of manners / by Christine Ricci ; illustrated by Susan Hall.
Select your desired format(s).
If none are selected, any available formats may be used.
Book
DVD
VHS
Select your desired language(s).
If none are selected, any available languages may be used.
English
Pickup location: Squamish Public Library
Notify when hold is ready for pickup?
Yes, by Email
Email Address: testing@testplace.org
Yes, by Phone
Phone Number: 250-250-2500
Yes, by Text Messaging
Mobile carrier: Telus Mobility (Canada & USA)
Note: carrier charges may apply
Mobile number: 250-306-6208
Hint: use the full 10 digits of your phone #, no spaces, no dashes
Submit
Cancel

Using *Group by Formats and Editions* Search

1. Search for the meta-record on which you want to place a hold. On the *Advanced Search* screen, select the *Group by Formats and Editions* checkbox. Select the search type and type in search terms. Click *Search*.



2. Click *Place Hold* beside the the meta-record on the result list.


36.
Harry Potter and the Deathly Hallows. Part 1 (2)
DVD
VHS
Publisher: Burbank, Calif. : Warner Home Video, c2011.
ISBN: 9780780661653
Phys. Desc.: 1 videodisc (146 min.) : sd., col. ; 4 3/4 in.
66 of 99 copies available at Sitka.
9 of 15 copies available at North Central Library Federation.
7 of 11 copies available at Cariboo Regional Library.
Place Hold
Add to my list

The icons indicate the available formats at the search location.

The number in the parenthsis beside the title indicates the number of records with physical items. Click the title to view these records.

Meta-record holds do not cover E-resources. But E-resource icons may be displayed if the search location owns matched E-resources. The link(s) will show up only when the search location and/or the preferred library of the login account is a library or branch and owns the E-resource. Click the link(s) in the summary to access these E-resource records.

3. Type in or scan the patron barcode at the prompt.

4. Select the acceptable formats. Use the *CTRL* key together with a mouse click to select multiple entries. Click *Submit* once done.

If no format is selected. All available formats are targeting candadites.

Format information is from the MARC record leader and fixed fields. Requested formats are listed in the *Holdable Formats* column in hold records. Use the Column Picker to display it. Once a new Web-browser-based staff client is used, format icons would be displayed in this column. Right now you will see a string. Look for the language/format codes, such as "eng", "fre", "book", "dvd", "blue-ray", etc. All the selected formats in any of the selected language(s) are targeting candidates.

After a meta-record hold is placed, if a new MARC record is added and it meets the grouping criteria (title, author and format), items under this new record will be used to fulfill the existing holds.

Volume Level Hold

1. To place a volume level hold, retrieve and display the record.

2. On the holdings grid, click *Volume* in *HOLDABLE?* column in the row of your chosen volume.

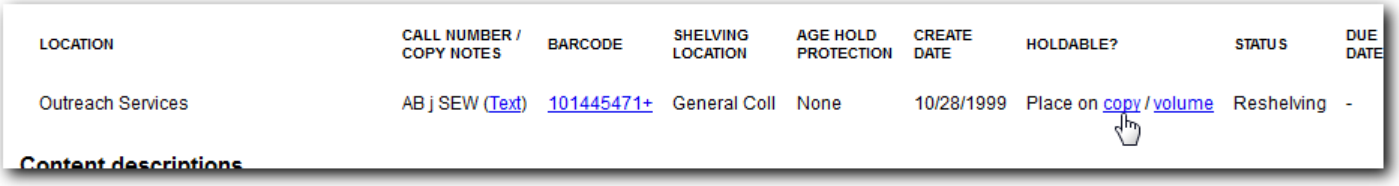
3. Scan or type patron's barcode into *Place hold for patron by barcode*.

4. Edit patron hold notification fields as required and click *Submit*. Note the hold is identified as a *Volume Hold*.

Copy Level Hold

1. Retrieve and display the record.

2. On the holdings grid, click *Copy* in *HOLDABLE?* column in the row of your chosen copy.

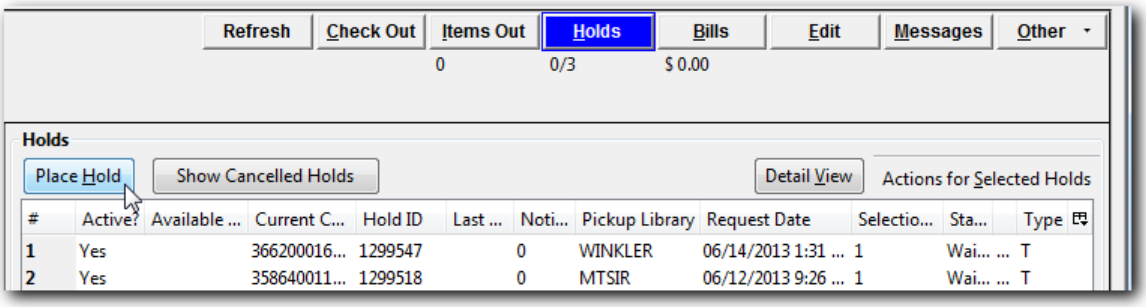


3. Scan or type patron's barcode into *Place hold for patron by barcode*.

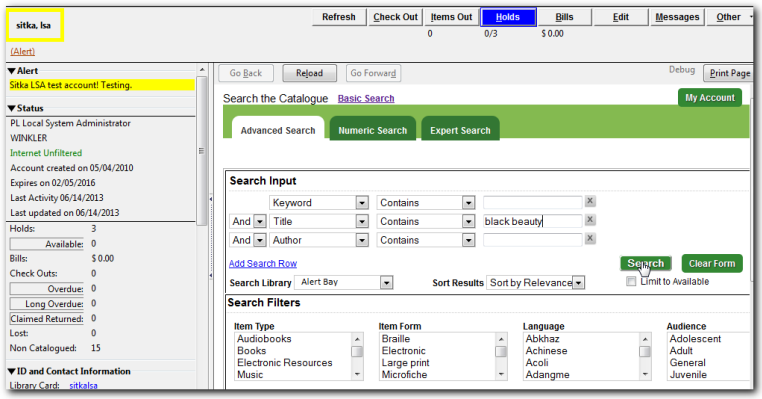
4. Edit patron hold notification fields as required and click *Submit*. Note the hold is identified as a *Copy Hold*.

Placing Holds in Patron Records

1. Holds can be placed from patron records too. In the patron record *Holds* screen, click the *Place Hold* button on the left top corner.



2. The catalogue is displayed in the *Holds* screen.



3. Search for the title and place holds using the same procedure as placing holds directly in the catalogue.

4. You may continue to search for more titles. Once you are done, click the *Holds* button on top to go back to the Holds screen. Click the *Refresh* button to reflect your newly placed holds.

9.2. Managing Holds

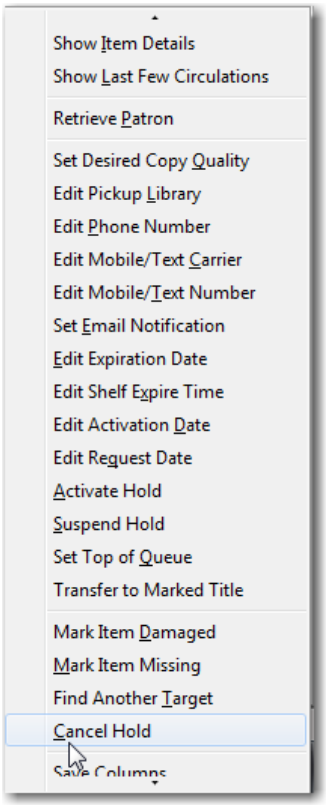
Holds can be cancelled at any time by staff or patrons. Before holds are captured, staff or patrons can suspend them or set them as inactive for a period of time without losing the hold queue position, activate suspended holds, change notification method, phone number, pick-up location (for multi-branch libraries only), expiration date, activation date for inactive holds, etc. Once a hold is captured, staff can change the pickup location and extend the hold shelf time if required.

Staff can edit holds in either patron's records or the title records. Patrons can edit their holds in their account on the OPAC.

Managing Holds in Patron Records

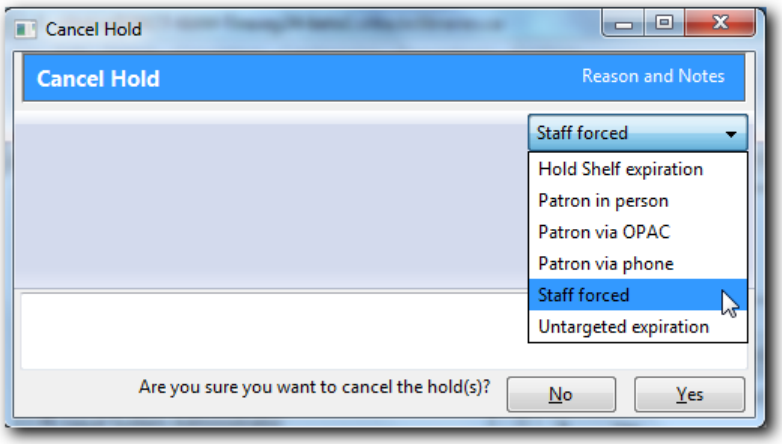
1. Retrieve the patron record and go to the *Holds* screen.

2. Highlight the hold record, then select *Actions for Selected Holds*.



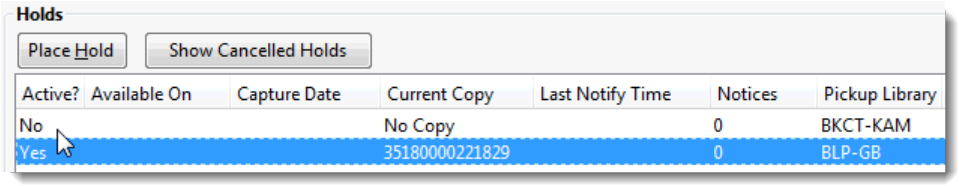
3. Manage the hold by choosing an action on the list.

1. If you want to cancel the hold, click *Cancel Hold* on the above screen. You are prompted to select a reason and put in a note if required. Once done, click *YES*.



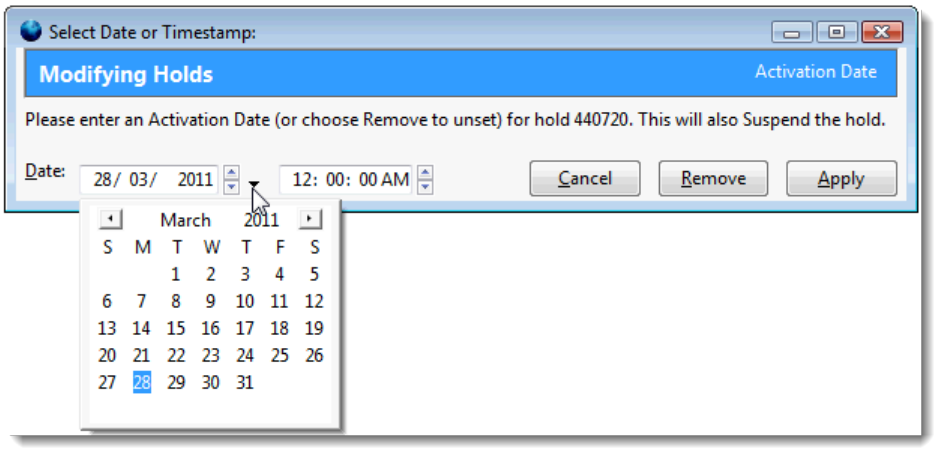
A captured hold with a status of "On Hold Shelf" or "Ready for Pickup" can be cancelled by either staff or patrons. But the status of the item will not be changed until staff check it in.

2. If you want to suspend a hold or activate a suspended hold, click the appropriate action on the list. You will be prompted to confirm your action. Suspended holds have a "No" value in the *Active?* column.



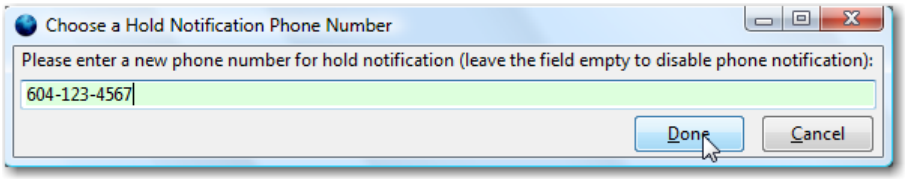
Suspended holds will not be filled but its hold position will be kept. They will automatically become active on the activation day if there is an activation date in the record. Without an activation date, the holds will remain inactive until staff or a patron activate them manually.

3. You may edit the Activation Date and Expiration Date by using the corresponding action entry on the *Action for Selected Holds* dropdown menu. You will be prompted to enter the new date. Use the calendar widget to choose a date, then click *Apply*. Use the *Remove* button to unset the date.

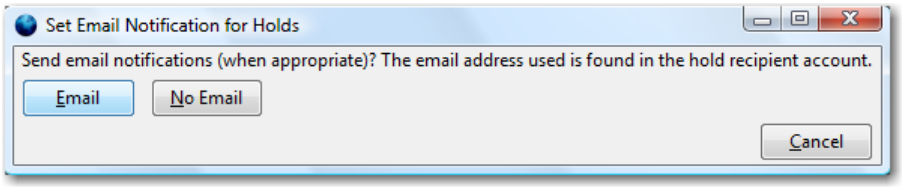

Select Date or Timestamp:
Modifying Holds
Activation Date
Please enter an Activation Date (or choose Remove to unset) for hold 440720. This will also Suspend the hold.
Date:
28/ 03/ 2011
12: 00: 00 AM
Cancel
Remove
Apply
March 2011
S M T W T F S
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31

4. Your library may set up a hold shelf time. Hold shelf expire time is automatically recorded in the hold record when a hold is filled. You may edit this time by using the *Edit Shelf Expire Time* on the *Action for Selected Holds* dropdown menu. You will be prompted to enter the new date. Use the calendar widget to choose a date, then click *Apply*.

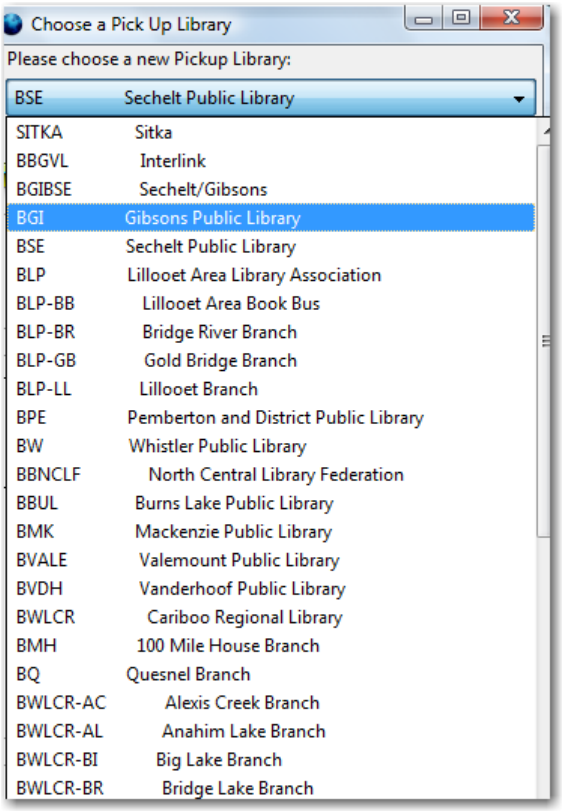
5. If you want to enable or disable phone notification or change the phone number, click *Edit Phone Notification*. You will be prompted to enter the new phone number. You must follow the format of XXX-XXX-XXXX. The phone number is used for this hold only and can be different from the one in the patron account. It has no impact on the patron account. If you leave it blank, no phone number will be printed on the hold slip.


Choose a Hold Notification Phone Number
Please enter a new phone number for hold notification (leave the field empty to disable phone notification):
604-123-4567
Done
Cancel

6. If you want to enable or disable email notification for the hold, click *Set Email Notification*. Click *Email* or *No Email* on the prompt screen.


Set Email Notification for Holds
Send email notifications (when appropriate)? The email address used is found in the hold recipient account.
Email
No Email
Cancel

7. Pickup location can be changed by clicking *Edit Pickup Library*. Click the dropdown list of all libraries and choose the new pickup location. Click *Done*.

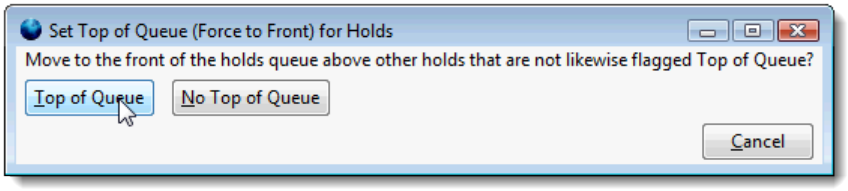

Choose a Pick Up Library
Please choose a new Pickup Library:
BSE Sechelt Public Library
SITKA Sitka
BBGVL Interlink
BGIBSE Sechelt/Gibsons
BGI Gibsons Public Library
BSE Sechelt Public Library
BLP Lillooet Area Library Association
BLP-BB Lillooet Area Book Bus
BLP-BR Bridge River Branch
BLP-GB Gold Bridge Branch
BLP-LL Lillooet Branch
BPE Pemberton and District Public Library
BW Whistler Public Library
BBNCLF North Central Library Federation
BBUL Burns Lake Public Library
BMK Mackenzie Public Library
BVALE Valemount Public Library
BVDH Vanderhoof Public Library
BWLCR Cariboo Regional Library
BMH 100 Mile House Branch
BQ Quesnel Branch
BWLCR-AC Alexis Creek Branch
BWLCR-AL Anahim Lake Branch
BWLCR-BI Big Lake Branch
BWLCR-BR Bridge Lake Branch

Staff can change the pickup location for holds with in-transit or ready-for-pickup status. Item will be sent in transit to the new destination.

Sitka Evergreen allows staff to select any library on the list as a pickup location. Staff should observe local policy and service agreement with other libraries.

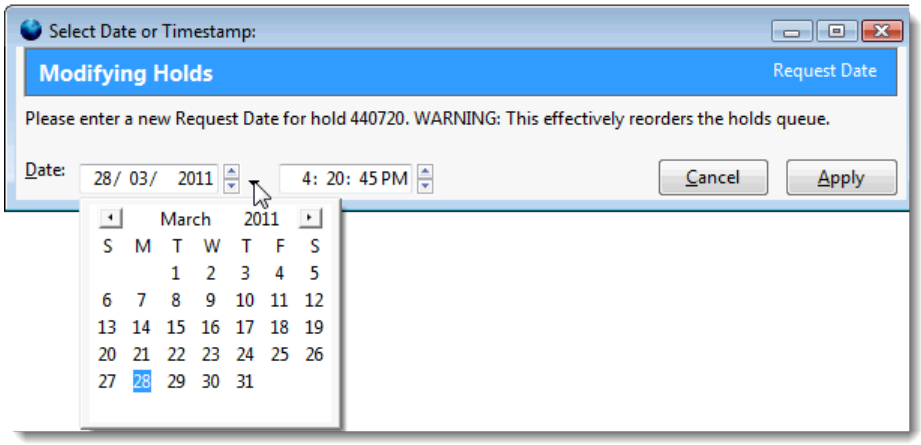
For libraries sharing resources with other libraries in the federation, Sitka support strongly recommends you not edit pickup location, instead cancel and replace the hold with the new pickup location. This is due to the fact that the eligible copies that may be used to fill the hold may be different with different pickup location. Editing the pickup location in the existing hold will not force Evergreen to re-target the eligible copies. The hold may be filled by a wrong copy.

8. You may move a hold to the top of the queue by using the *Set Top of Queue* option in *Actions for Selected Holds*. Click *Top of Queue* to move the selected hold to the top of the hold queue. Click *No Top of Queue* to remove it from the top of the queue. You will be prompted to confirm your action.


Set Top of Queue (Force to Front) for Holds
Move to the front of the holds queue above other holds that are not likewise flagged Top of Queue?
Top of Queue
No Top of Queue
Cancel

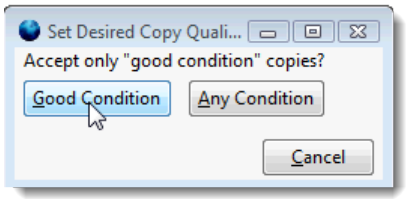
If an item has been assigned to the hold on top of the queue before you move another one to the top, you need to suspend the old top hold, *Find Another Target* for the new top hold, then activate the old top hold.

9. You can also manipulate hold position by adjusting Hold Request Time. Use *Edit Request Time* on *Actions for Selected Holds*. Use the calendar widget to select a date.

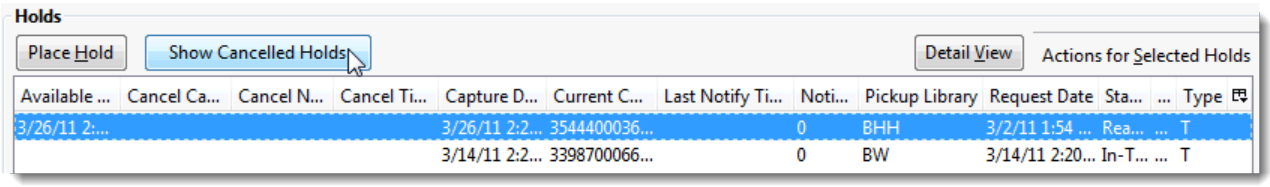

Select Date or Timestamp:
Modifying Holds
Request Date
Please enter a new Request Date for hold 440720. WARNING: This effectively reorders the holds queue.
Date:
28/ 03/ 2011
4: 20: 45 PM
Cancel
Apply
March 2011
S M T W T F S
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31

For most libraries, holds are filled based on request time sequence. Changing request time will change the holds fufillment sequence.

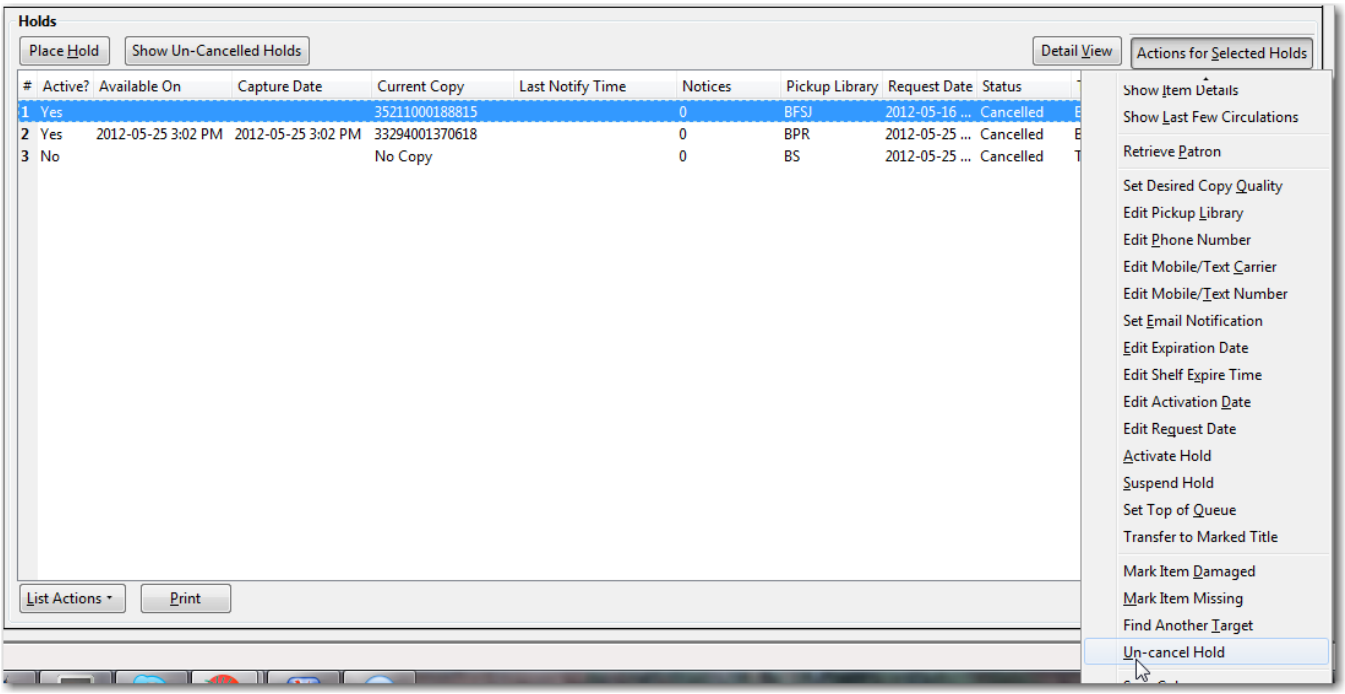
10. The item's physical condition is recorded in the copy record as Good or Mediocre in the *Quality* field. You may request that your holds be filled with copies of good quality only. Click *Set Desired Copy Quality* on the *Actions for Selected Holds* list. Make your choice in the pop-up window.



Cancelled holds can be displayed. Click *Show Cancelled Holds* button on the *Holds* screen.



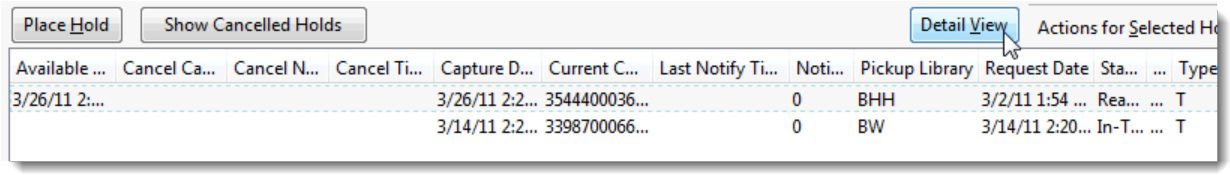
You may un-cancel it.


Holds
Place Hold
Show Un-Cancelled Holds
Detail View
Actions for Selected Holds
Active? Available On Capture Date Current Copy Last Notify Time Notices Pickup Library Request Date Status
1 Yes 35211000188815 0 BFSJ 2012-05-16 ... Cancelled
2 Yes 2012-05-25 3:02 PM 2012-05-25 3:02 PM 33294001370618 0 BPR 2012-05-25 ... Cancelled
3 No No Copy 0 BS 2012-05-25 ... Cancelled
List Actions
Print
Show Item Details
Show Last Few Circulations
Retrieve Patron
Set Desired Copy Quality
Edit Pickup Library
Edit Phone Number
Edit Mobile/Text Carrier
Edit Mobile/Text Number
Set Email Notification
Edit Expiration Date
Edit Shelf Expire Time
Edit Activation Date
Edit Request Date
Activate Hold
Suspend Hold
Set Top of Queue
Transfer to Marked Title
Mark Item Damaged
Mark Item Missing
Find Another Target
Un-cancel Hold

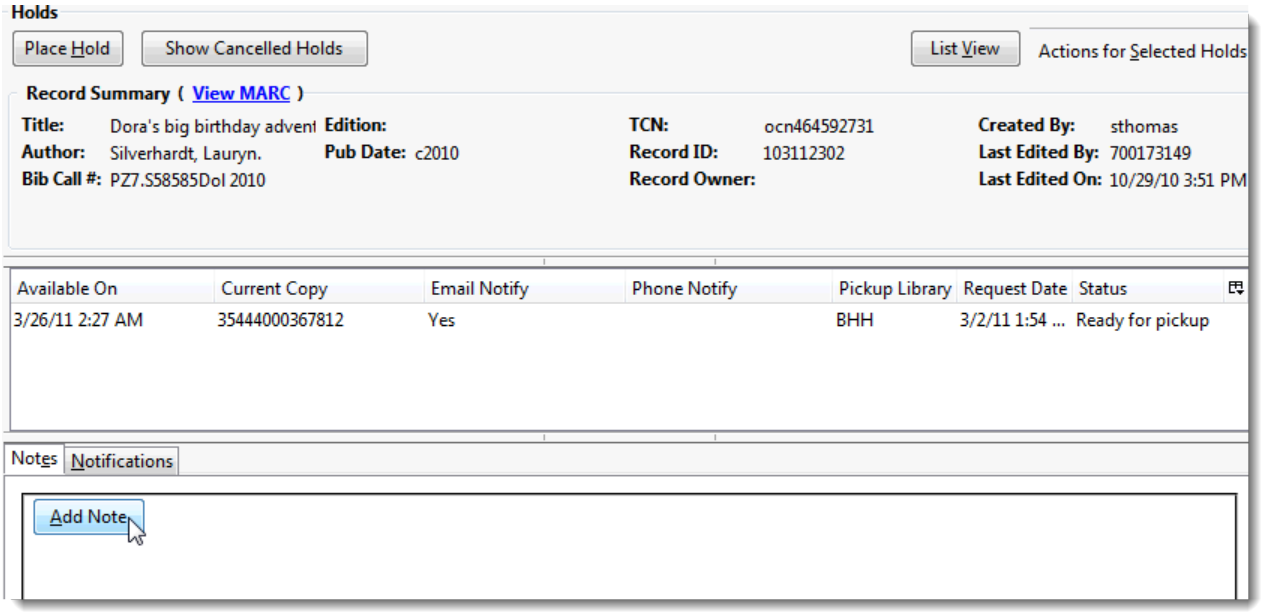
Based on your library's setting, hold request time can be reset when a hold is un-cancelled.

Cancelled holds displayed on the *Cancelled Holds* screen can be limited by hold age (amount of time) or count (a number). Individual libraries can set this up in the *Library Settings Editor*. See Chapter 48, *Local Administration Menu*.

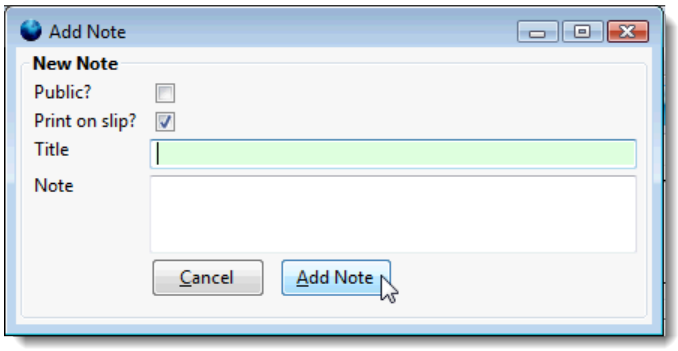
You can view details of a hold by selecting a hold then clicking the *Detail View* button on the *Holds* screen.



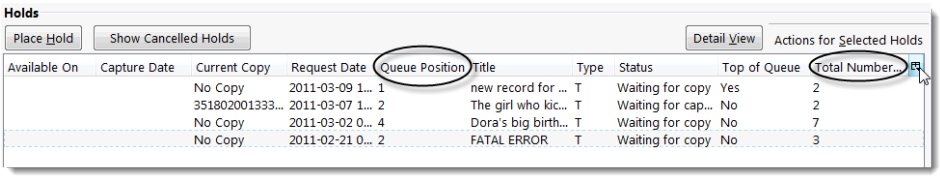
You may add a note to a hold in the *Detail View*.



Notes can be printed on the hold slip if the *Print on slip?* checkbox is selected. Key in the message then click *Add Note*.



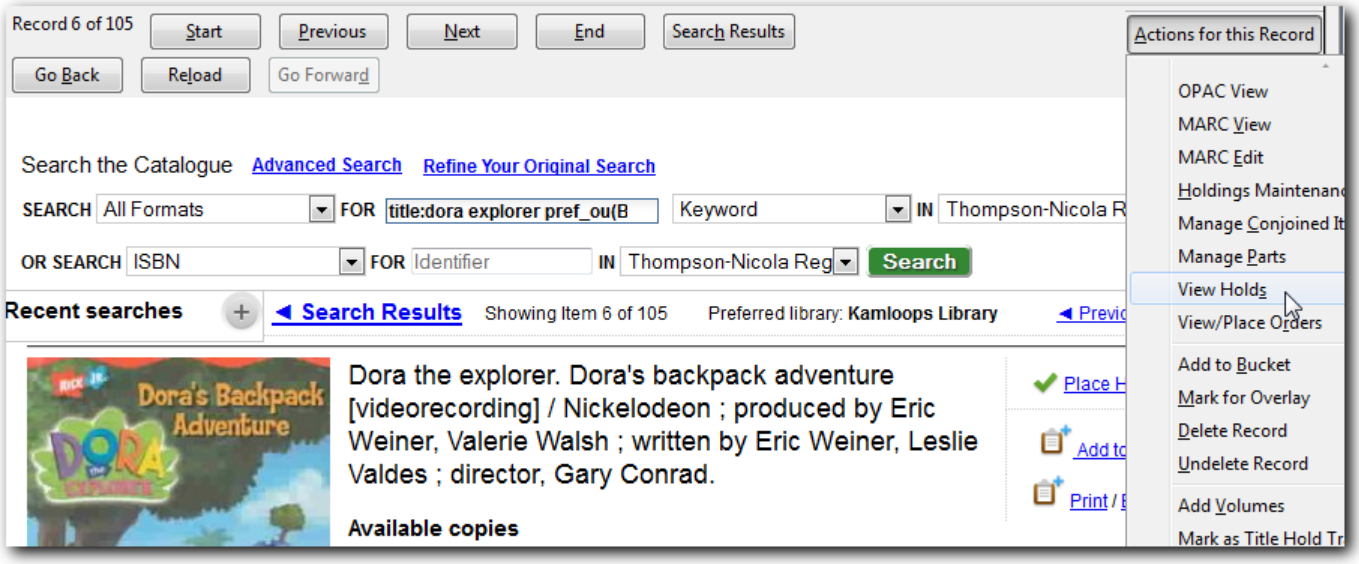
Using the Column Picker, you can display Queue Position and Total number of Holds.



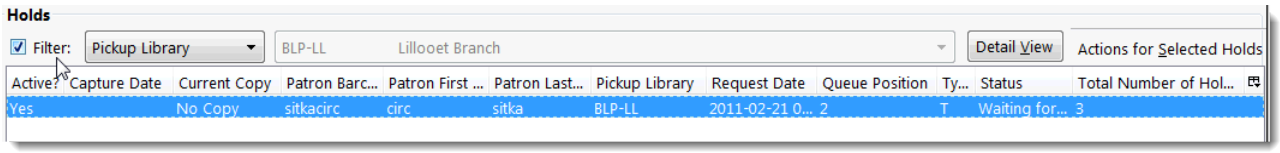
Managing Holds in Title Records

1. Retrieve and display the title record in the catalogue.

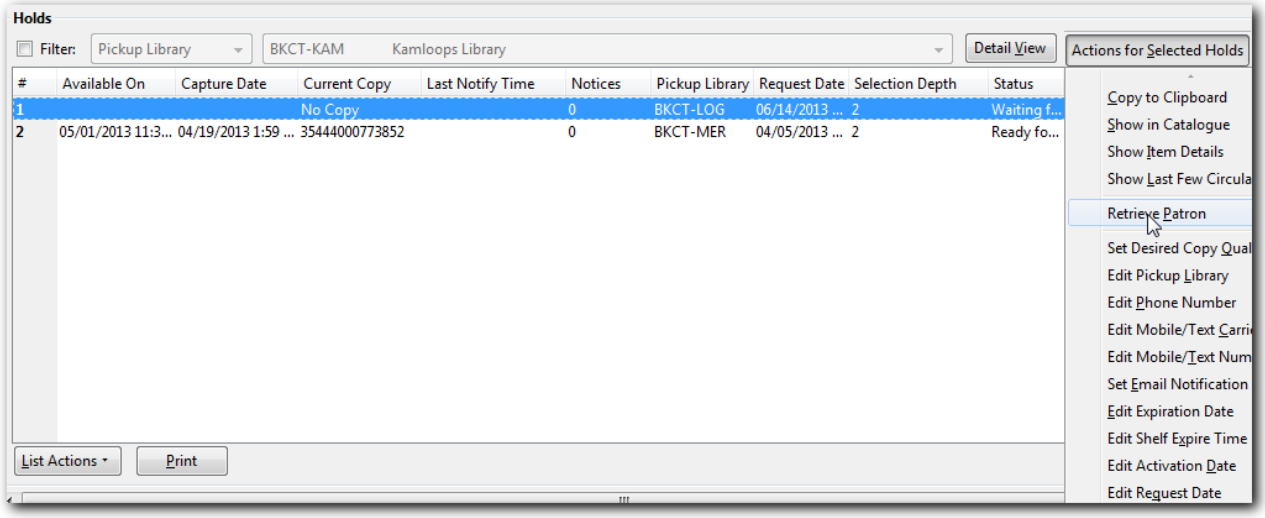
2. Click *Actions for this Record* → *View Holds*.



3. All holds on this title to be picked up at your library are displayed. Use *Filter* checkbox and *Pickup Library* to view holds to be picked up at other branches of your libary system.



4. Highlight the hold you want to edit. Click *Actions for Selected Holds* and the appropriate action you want to take as described in step 3 of the section called “Managing Holds in Patron Records”.



You can retrieve the hold requestor's account by selecting *Retrieve Patron* on the above dropdown menu.

9.3. Holds Pull List

There are five types of status a hold may have: Waiting for Copy, Waiting for Capture, In Transit, Ready for Pickup, and the optional Reserved/Pending.

If your library chooses to delay hold shelf status (see Chapter 48, *Local Administration Menu*), then a hold may have the status of Reserved/Pending.

1. Waiting-for-copy holds: all holdable copies are checked out or not available.

2. Waiting-for-capture holds: an available copy is assigned to the hold. The item shows up on the Holds Pull List waiting for staff to search the shelf and capture the hold.

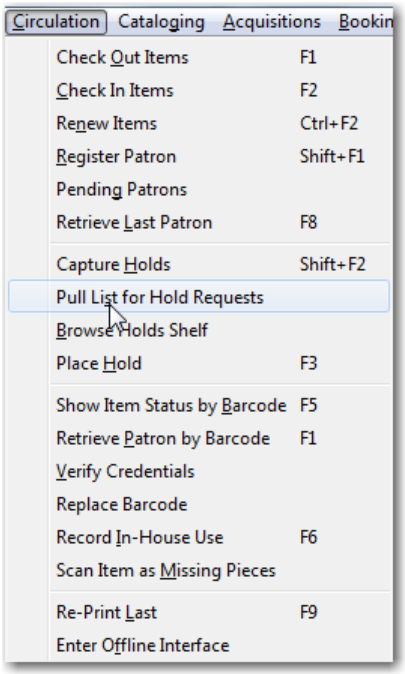
3. In Transit holds: holds are captured at a non-pickup branch and on the way to the pick-up location.

4. Ready-for-pick-up holds: holds are captured and items are on the Hold Shelf waiting for patrons to pick up.

5. Reserved/Pending holds: holds are captured and items are in process and to be put on the Hold Shelf. The status will be automatically changed to Ready-for-pick-up once the delay time period specified in Library Settings Editor expires.

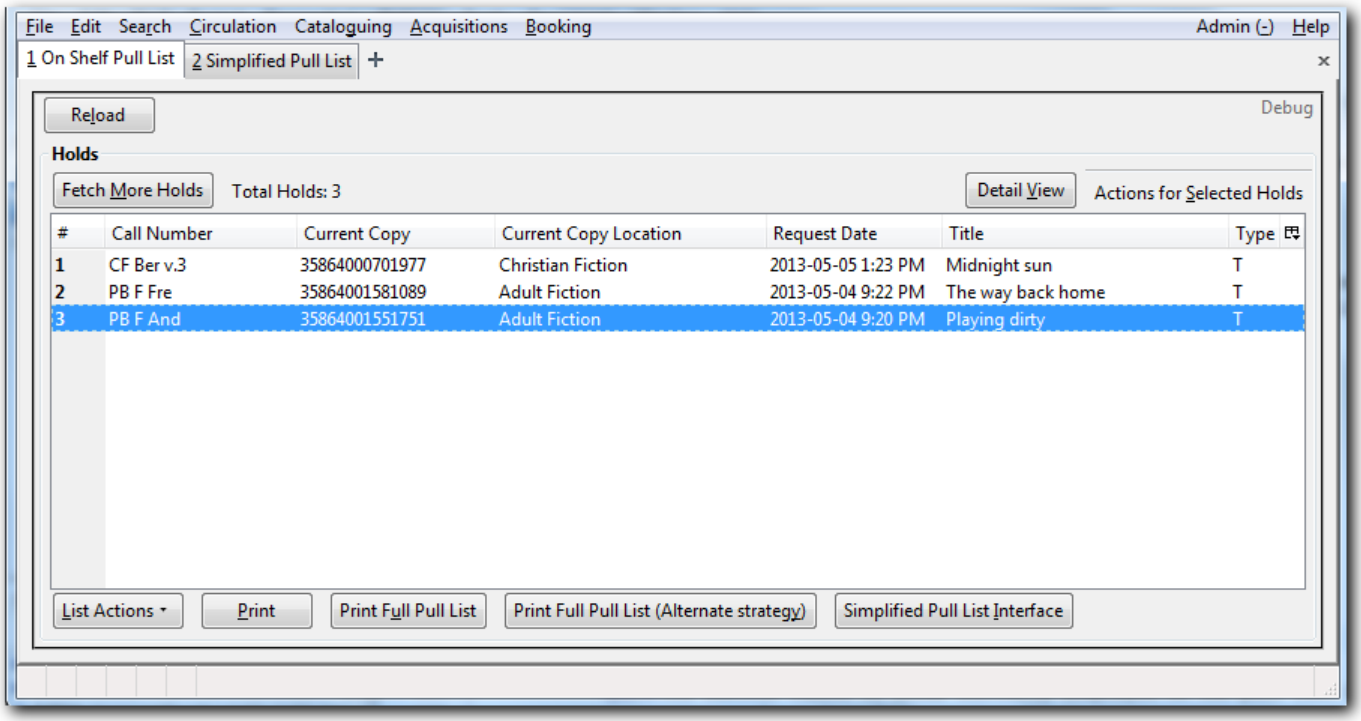
Besides capturing holds when checking in items, Evergreen matches holds with available items in your library at regular intervals. Once a matching copy is found, the item's barcode number is assigned to the hold and the item is put on the Holds Pull List. Staff can print the Holds Pull List and search for the items on shelves.

1. To retrieve your *Holds Pull List* select *Circulation* → *Pull List for Hold Requests*.



2. The *Holds Pull List* is displayed. By default the items on the list are grouped first by Copy Location, then by Call Number. You may re-sort it by clicking the column labels, e.g. *Title*.

> The order of Copy Location can be adjusted on *Admin* → *Local Administration* → *Copy Location Order*

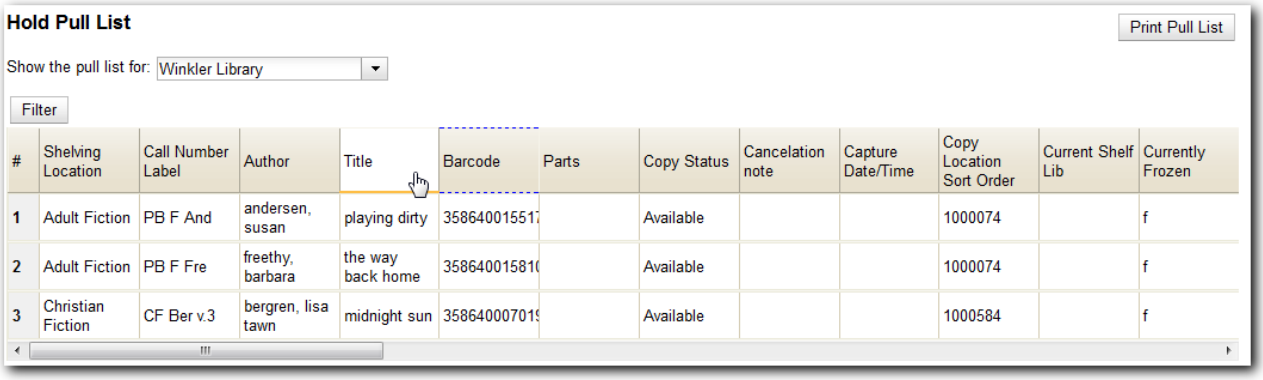

File Edit Search Circulation Cataloguing Acquisitions Booking Admin (-) Help
1 On Shelf Pull List
2 Simplified Pull List
Reload
Debug
Holds
Fetch More Holds
Total Holds: 3
Detail View
Actions for Selected Holds
Call Number Current Copy Current Copy Location Request Date Title Type
1 CF Ber v.3 35864000701977 Christian Fiction 2013-05-05 1:23 PM Midnight sun T
2 PB F Fre 35864001581089 Adult Fiction 2013-05-04 9:22 PM The way back home T
3 PB F And 35864001551751 Adult Fiction 2013-05-04 9:20 PM Playing dirty T
List Actions
Print
Print Full Pull List
Print Full Pull List (Alternate strategy)
Simplified Pull List Interface

> The maximum number of holds initially displayed on the pull list is about 100. Use *Fetch More Holds* to retrieve more records.

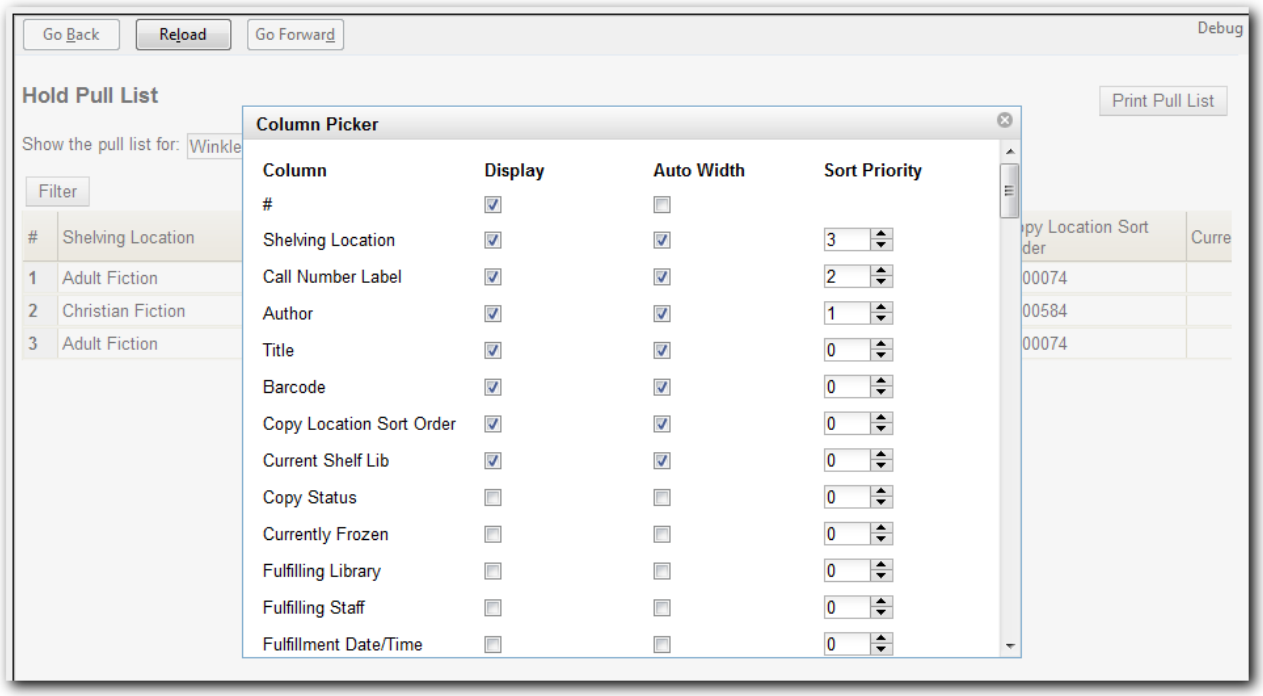
3. To print the pull list you may use *Print Full Pull List*, *Print Full Pull List (Alternate Strategy)* or go to *Simplified Pull List Interface*. The full list prints Title, Author, Shelving Location, Call Number and Item Barcode, while the alternative stragegy also prints patron barcode. *Print* button prints title only.

> You may export holds pull list to a CSV file, then import it into MS Excel to re-format it for printing. Use *List Actions* button on bottom left of screen.

4. Click *Simplified Pull List Interface*. The pull list will be displayed in a new tab.


Hold Pull List
Print Pull List
Show the pull list for: Winkler Library
Filter
Shelving Location Call Number Label Author Title Barcode Parts Copy Status Cancelation note Capture Date/Time Copy Location Sort Order Current Shelf Lib Currently Frozen
1 Adult Fiction PB F And andersen, susan playing dirty 358640015517 Available 1000074 f
2 Adult Fiction PB F Fre freethy, barbara the way back home 358640015810 Available 1000074 f
3 Christian Fiction CF Ber v.3 bergren, lisa tawn midnight sun 358640007019 Available 1000584 f

5. You may sort the list by clicking the column label or you may go to the column picker to choose the displayed fields and sort order. Move the cursor to any column in the label row as shown in the above screen and right click your mouse. The column picker will be displayed.



6. You may select/deselect the checkboxes in the *Display* column to choose the fields that you want to display/ hide. Select *Auto Width* checkbox if you wish Evergreen to automatically adjust the width of each column. Set the values for *Sort Priority* for all the fields that you want to sort by. The example list in the above screen will be sorted by *Shelving Location*, *Call Number*, and then *Author*.

7. Scroll to the bottom of the list and click *Save*.

8. Click *Print Full List*. The list will be printed with the selected displayed fields and in the selected sort order.

The current version of Evergreen may not display a whole list of holds on the screen in *Simplified Pull List*, but the printed list is complete.

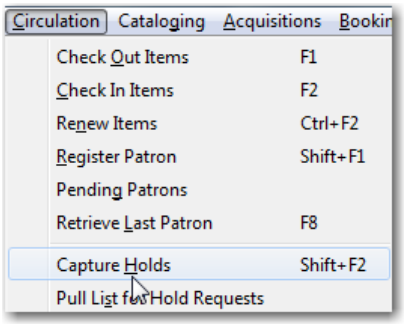
9. You may perform hold management tasks by using the *Actions for Select Holds* dropdown list.

The Holds Pull List is updated constantly. Once an item on the list is no longer available or a hold on the list is captured, the items will disappear from the list. The Holds Pull List should be printed at least once a day.

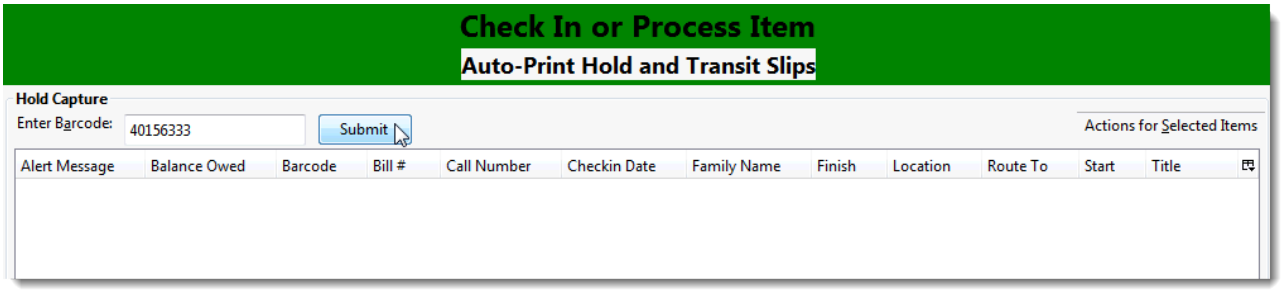
9.4. Capturing Holds

Holds can be captured when a checked-out item is returned (checked in) or an item on the Holds Pull List is retrieved and captured. When a hold is captured, the hold slip will be printed and if the patron has chosen to be notified by email, the email notification will be sent out. The item should be put on the hold shelf.

1. To capture a hold, Select *Circulation* → *Capture Holds*.

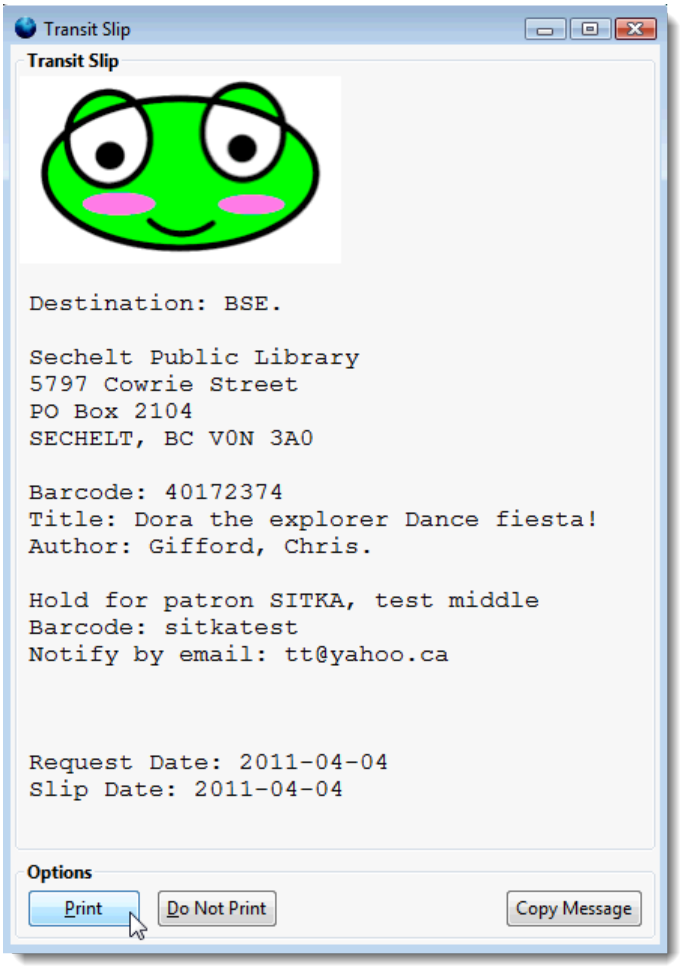


2. Scan or type barcode and click *Submit*.



3. The following hold slip is automatically printed.

4. If the item should be sent to another location, a hold transit slip will be printed.



If your library chooses to keep on-hold items behind the desk for some patrons (*Hold is behind Circ Desk* checkbox is selected in the patron record), you will be prompted to route the item to Private Hold Shelf. See Chapter 48, *Local Administration Menu* for how to set up Behind Desk Pickup.

If a patron has a *OPAC/Staff Client Holds Alias* in his/her account, it will be used on the hold slip instead of the patron name.

Holds can also be captured on the *Circulation* → *Check In Items* screen. If you have selected the *Auto-Print Hold and Transit Slips* checkbox, the hold slip will be printed automatically without confirmation prompt.

9.5. Find Another Target for Holds

For an item on the *Holds Pull List* but not found on the shelves or the item is not in proper condition for circulation, staff may mark it missing or damaged and find another item for the hold, if it is not the only copy.

Finding another target for holds, or retargeting the holds, can be done at several places:

- *View Holds* in title record: selecting *Actions for this Record* > *View Holds*
- *Holds* in patron record

- *Holds Pull List*

You need to select the hold and click *Actions for Selected Holds → Find Another Target.* Evergreen immediately searches for an available copy for the hold and puts it on the *Holds Pull List*. If there is no available copy, the hold's status will be set to "Wait for copy".

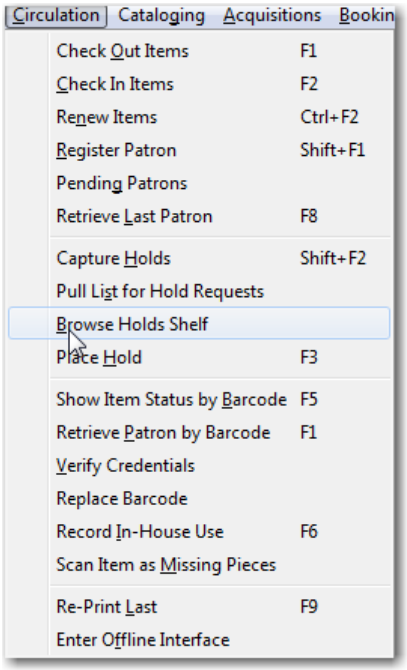
Evergreen's holds targeting program, the holds targeter, identifies holdable copies and builds a holdable copy list once a day at midnight. When an item is checked in, Evergreen will match it with the holdable copy list to identify pending holds. Items with non-holdable status are not on the list. Items currently not on the holdable copy list will be not used to match with holds.

The holds targeter matches new holds (requested within 24 hours) with available copies on the holdable copy list every 15 minutes. For old holds (requested more than 24 hours ago), the holds targeter matches them once every 24 hours at roughly the hold request time.

Newly created items, or items of which the status was just changed from a non-holdable to a holdable status, such as from Missing to Reshelving, are not on the holdable copy list until midnight after the next holdable copy list has been re-generated. Using the checkin modifiers *Retarget Local Holds* and *Retarget All Statuses* will check all the potential holds picked up at the checkin library that may be filled by the copy, instead of just the holdable copy list. These checkin modifiers are sticky, and Sitka support recommends they be turned on unless your library belongs to a resource-sharing group, which means the item may be used to fill a hold picked up at aother library/branch. In such cases, staff may re-target the hold on top of the holds queue on the *Catalogue > View Holds* screen.

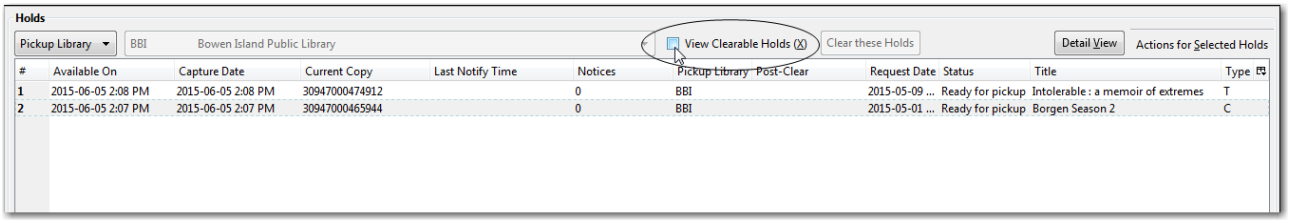
9.6. Holds Shelf List and Clearing Shelf-Expired Holds

1. Items with Ready-for-pickup status are on the Holds Shelf List. The Holds Shelf List can help you manage items on the holds shelf. To see the holds shelf list, select *Circulation → Browse Holds Shelf*



2. The Holds Shelf List is displayed. Note the *Actions for Selected Holds* are available, as in the patron record. You can cancel stale holds here.

3. Select *View Clearable Holds* checkbox to list expired or cancelled holds only. The *Clear These Holds* button is then lit up. Click it and the expired holds will be cancelled.


Holds
Pickup Library
BBI
Bowen Island Public Library
View Clearable Holds (X)
Clear these Holds
Detail View
Actions for Selected Holds
Available On Capture Date Current Copy Last Notify Time Notices Pickup Library Post-Clear Request Date Status Title Type
1 2015-06-05 2:08 PM 2015-06-05 2:08 PM 30947000474912 0 BBI 2015-05-09 ... Ready for pickup Intolerable : a memoir of extremes T
2 2015-06-05 2:07 PM 2015-06-05 2:07 PM 30947000465944 0 BBI 2015-05-01 ... Ready for pickup Borgen Season 2 C

4. Print the list, bring the items down from the hold shelf and check them in.

If you cancel a ready-for-pickup hold, you must check in the item to make it available for circulation or trigger the next hold in line.

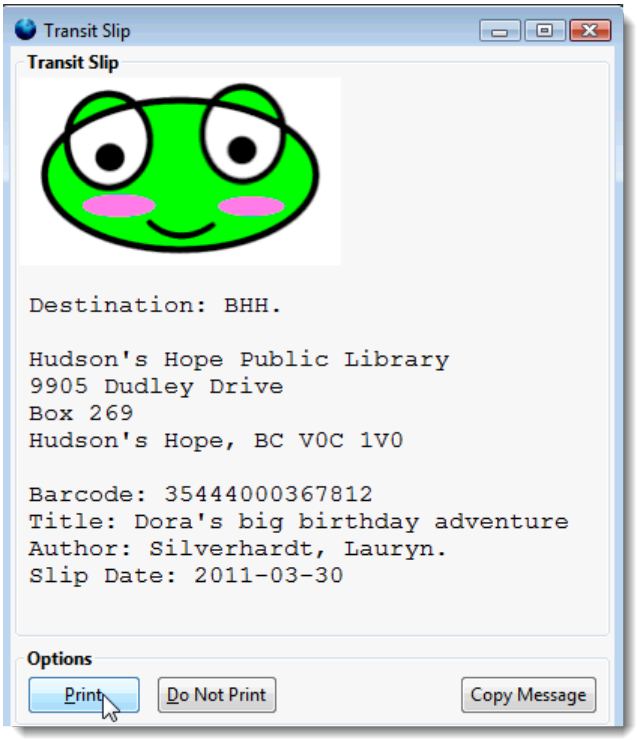
Hold shelf expire time is inserted when a hold achieves on-hold-shelf status. It is calculated according to the individual library's default hold shelf time expire interval in the Library Settings Editor. See Chapter 48, *Local Administration Menu*.

Chapter 10. Items in Transit

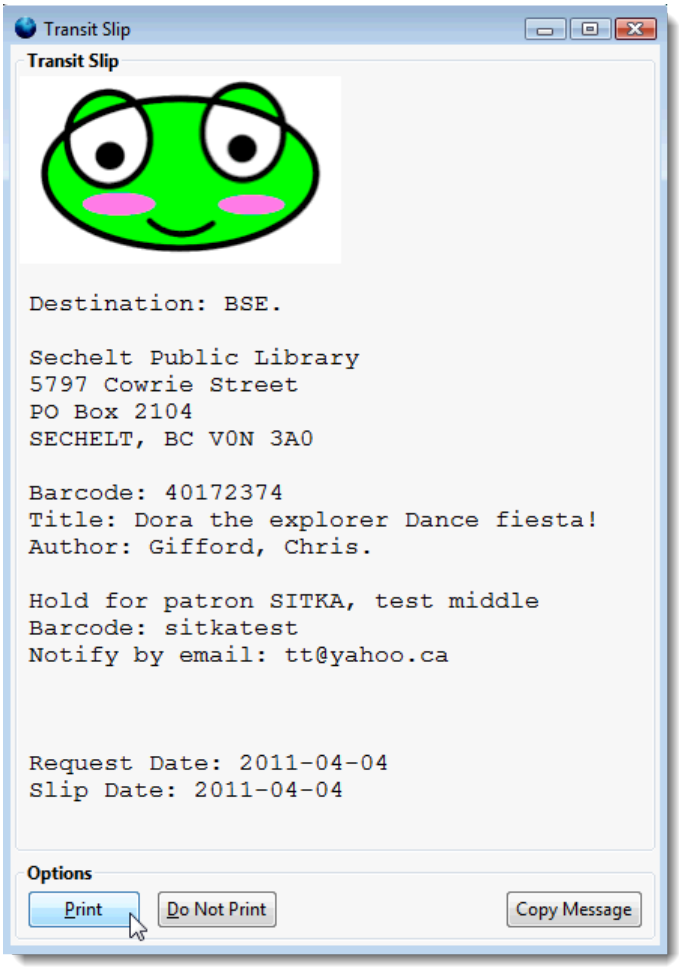
Evergreen's *In Transit* feature is used to keep track of items transferring among branches within a library system or libraries. It makes it easy for libraries to provide services such as allowing patrons to return items at any branch or place holds on items belonging to another branch.

10.1. When will an item go In Transit?

1. When an item is checked in at the non-owning branch the status will be changed to *In transit* and a *Transit Slip* can be printed. Items in transit should be set aside and sent to the destination branch according to your library's policy and workflow.



2. When you capture a hold with a pickup branch other than your branch, the item's status will be changed to *In transit*. If you capture the hold on the *Check In* screen you will be prompted to print the *Transit/Hold slip* shown below. If you capture the hold on the *Capture Holds* screen, a *Transit/Hold slip* will be printed automatically if you have a printer attached.



10.2. How to receive In transit items?

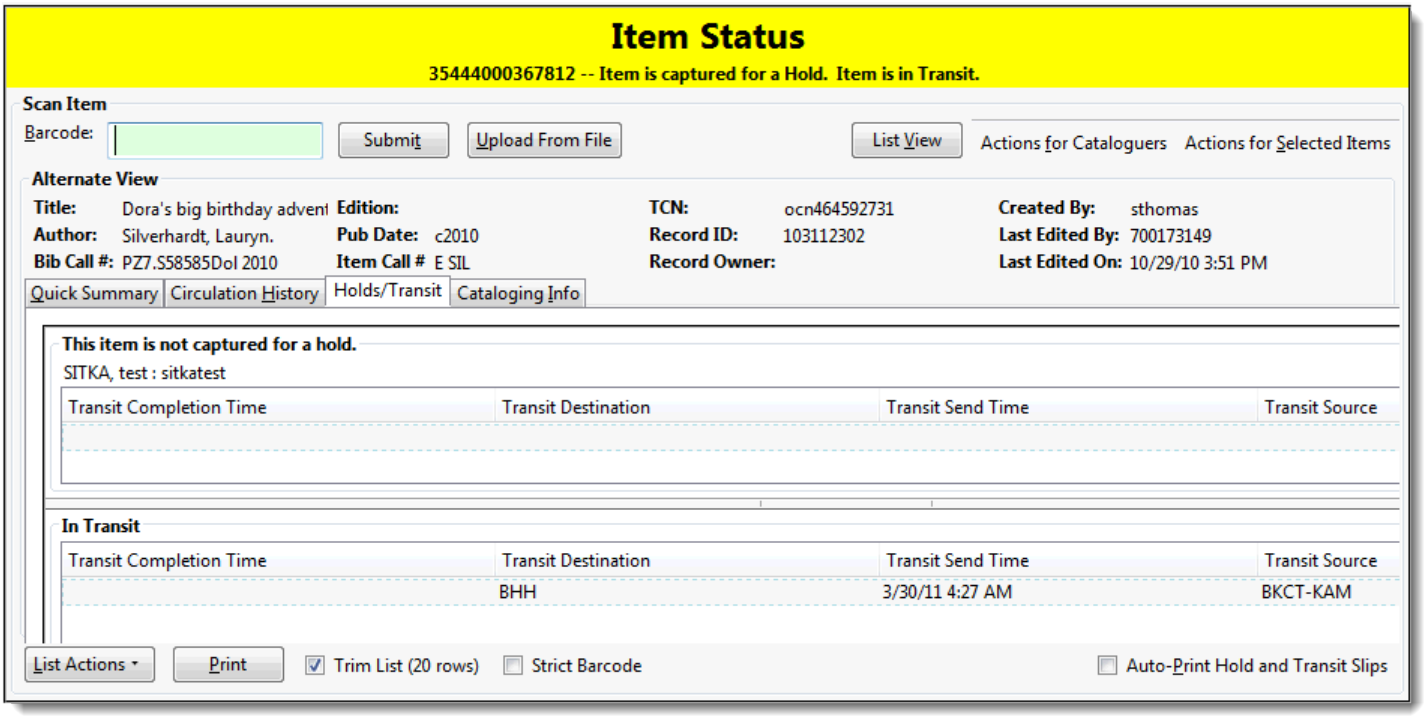
At the receiving branch, all items received should be checked in so that items' status will be changed from In transit to Reshelving. If an item has a hold on it, a Hold Slip will be printed. If the pickup branch for the hold is not your branch, the item will be sent In transit again to the pickup branch. A Transit/Hold Slip will be printed.

10.3. Transit Details

You may find out the source and destination library of a transit on the *Item Status F5* screen.

1. Retrieve the item by barcode.

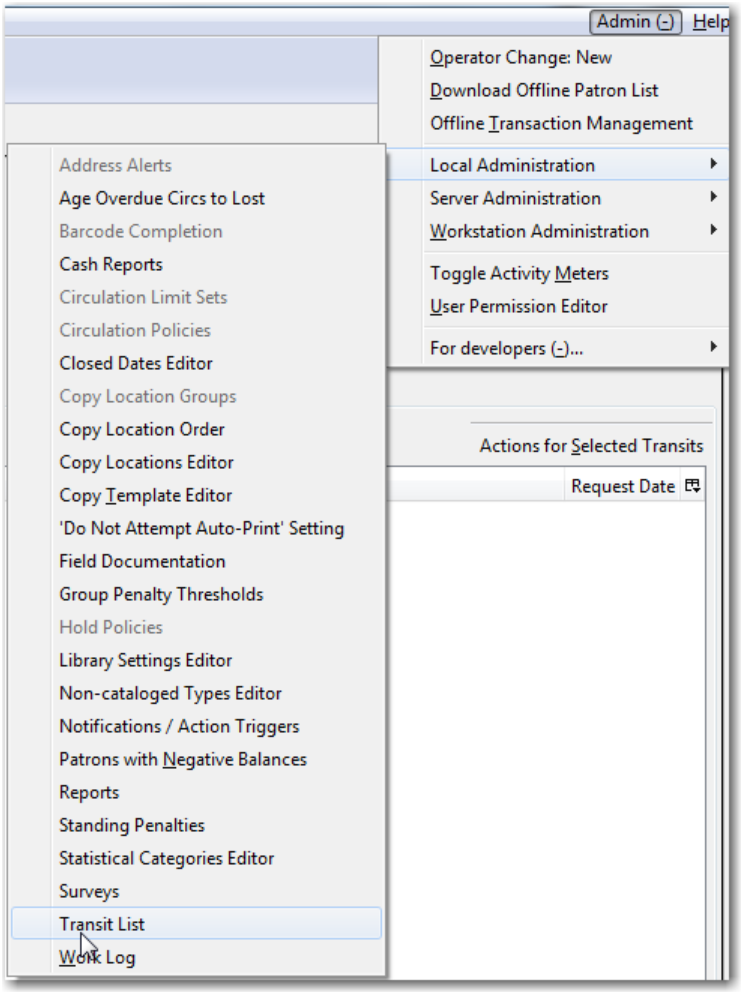
2. Select the item and go to *Alternate View*. Select *Holds/Transit* tab. Transit information is displayed in *In Transit* on the lower part of the screen.



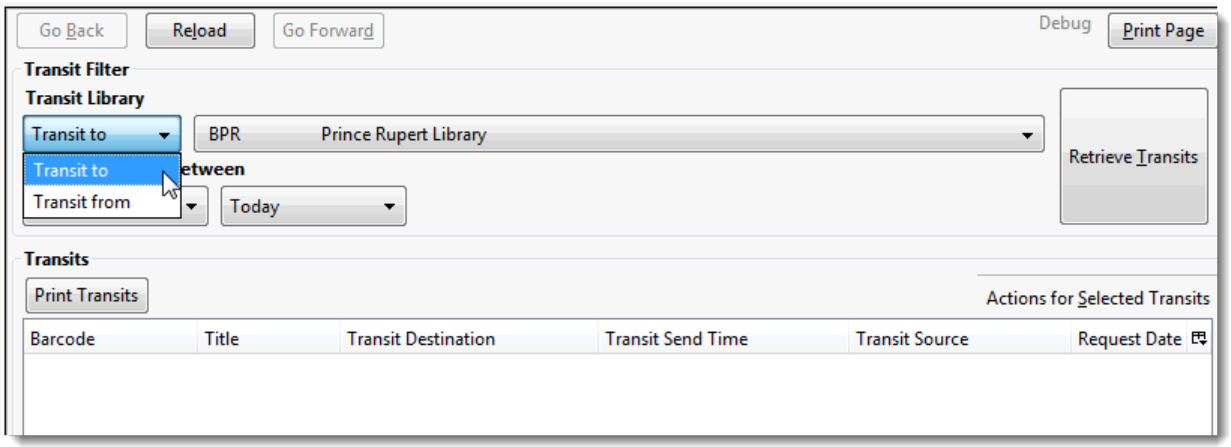
10.4. Transit List

The *Transit List* report can be used as a tool to help manage your incoming and outgoing transits.

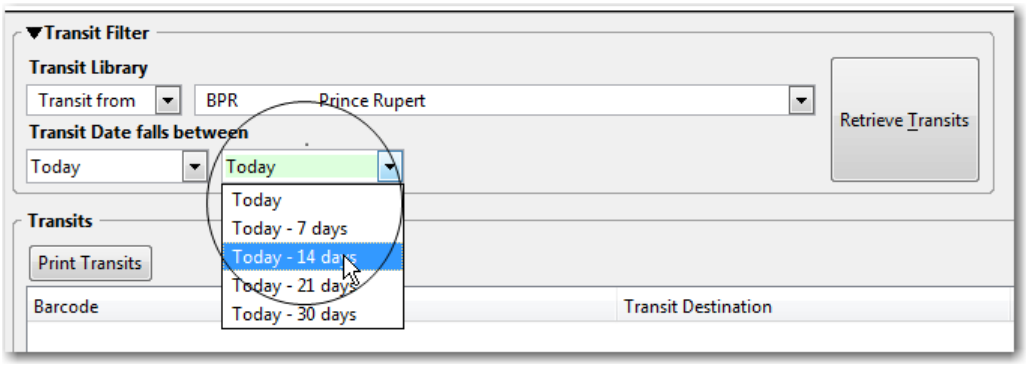
1. To access the Transit List report, select *Admin* → *Local Administration* → *Transit List*.



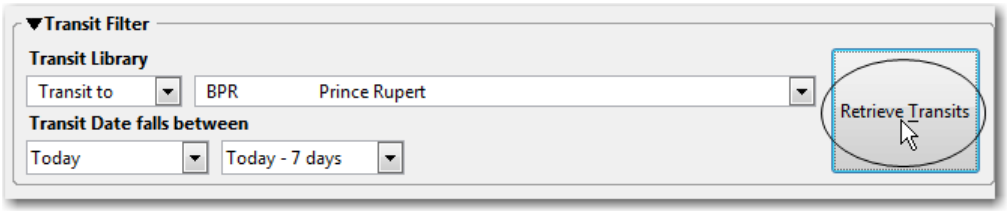
2. Specify *Transit to* or *Transit from* library from the dropdown menu to retrieve transits coming to or sending from your library.



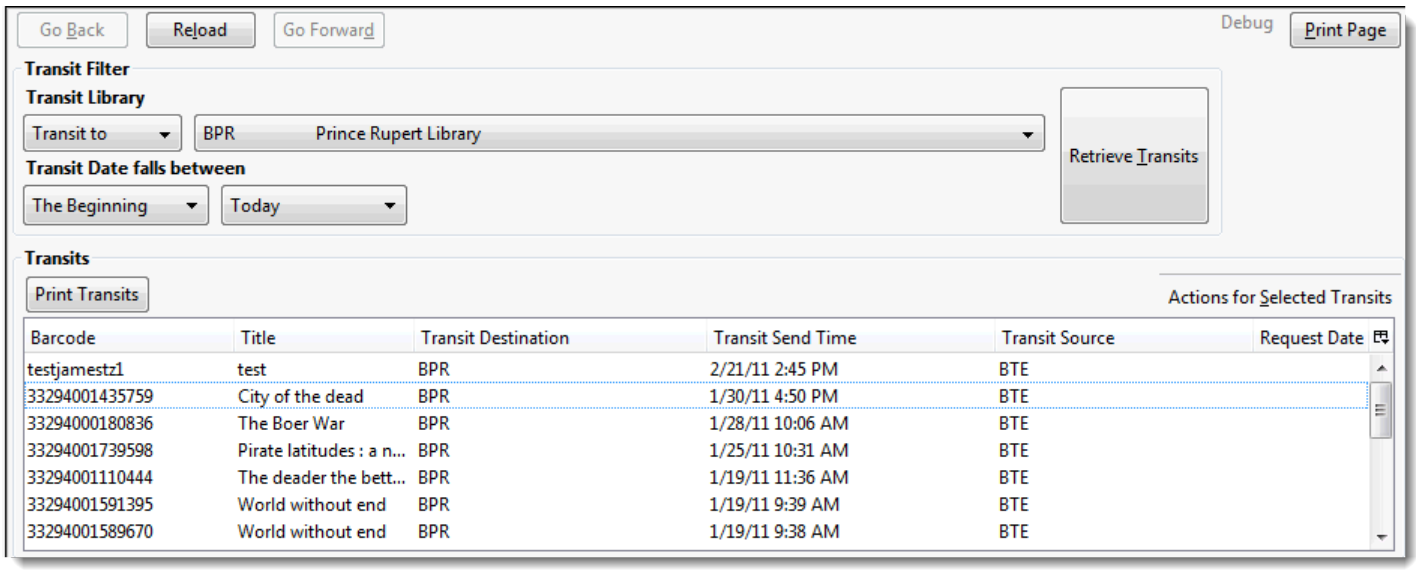
3. Pick a date range in *Transit Date falls between* fields.



4. Click *Retrieve* Transits.



5. Those items, which were sent In Transit within the date range, and with an In Transit status, are listed.



It is good practice to pull *Transit Lists* when sending or receiving items to and from other branches. Reconciling the list against the physical items helps ensure your shipments are complete.

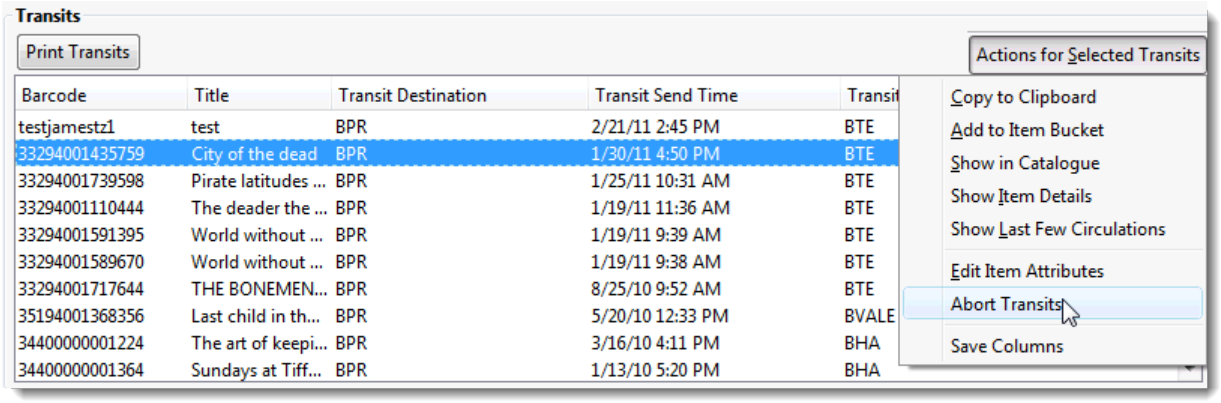
10.5. Aborting Transits

Under certain circumstances aborting transit may be required. But aborting transit may affect data integrity or affect the accuracy of statistics. Sitka Support strongly suggests libraries be cautious with this function. The general guideline is that the sending libraries may abort a transit before sending out items, while receiving libraries never abort a transit but check them in instead.

Aborting a transit from within the Transit List screen.

1. From the *Transit List* screen select the transit(s) you wish to cancel

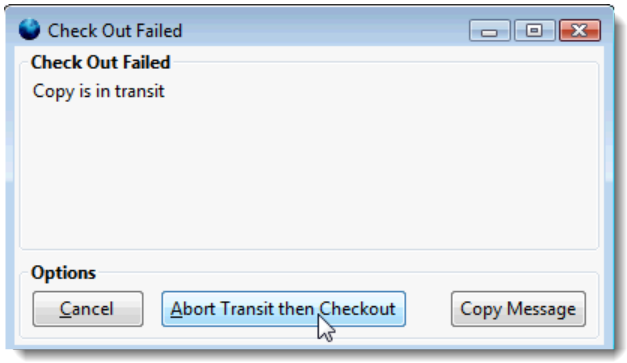
2. Select *Actions for Selected Transits* → *Abort Transits*.


Transits
Print Transits
Actions for Selected Transits
Barcode
Title
Transit Destination
Transit Send Time
Transit
testjamestz1 test BPR 2/21/11 2:45 PM BTE
33294001435759 City of the dead BPR 1/30/11 4:50 PM BTE
33294001739598 Pirate latitudes ... BPR 1/25/11 10:31 AM BTE
33294001110444 The deader the ... BPR 1/19/11 11:36 AM BTE
33294001591395 World without ... BPR 1/19/11 9:39 AM BTE
33294001589670 World without ... BPR 1/19/11 9:38 AM BTE
33294001717644 THE BONEMEN... BPR 8/25/10 9:52 AM BTE
35194001368356 Last child in th... BPR 5/20/10 12:33 PM BVALE
34400000001224 The art of keepi... BPR 3/16/10 4:11 PM BHA
34400000001364 Sundays at Tiff... BPR 1/13/10 5:20 PM BHA
Copy to Clipboard
Add to Item Bucket
Show in Catalogue
Show Item Details
Show Last Few Circulations
Edit Item Attributes
Abort Transits
Save Columns

3. The transit is cancelled. It will still display in the list, but if you re-click *Retrieve Transits* the screen will be refreshed and the item will no longer display as a transit, and the item will have a status of *Reshelving*.

Cancelling a Transit at Checkout

If an item with status of *In transit* is to be checked out, you can override the block by clicking *Abort Transit then Checkout*.



In Transit by Mis-scanning

Sometimes mis-scanning happens when you check in an item. Occasionally the mis-captured barcode number happens to be a valid item of another library. This sends the item in transit wrongly. To correct these mistakes libraries need to regularly access their Transit List and abort the invalid transits.

It is good practice for libraries to inform the owning library if an item with special status, e.g. checked out, missing, lost etc., is sent in transit by mis-scanning.

Some transits can not be cancelled/aborted, such as items with a previous status of Missing. Such items have to be checked in at the owning library.

Chapter 11. Self Check

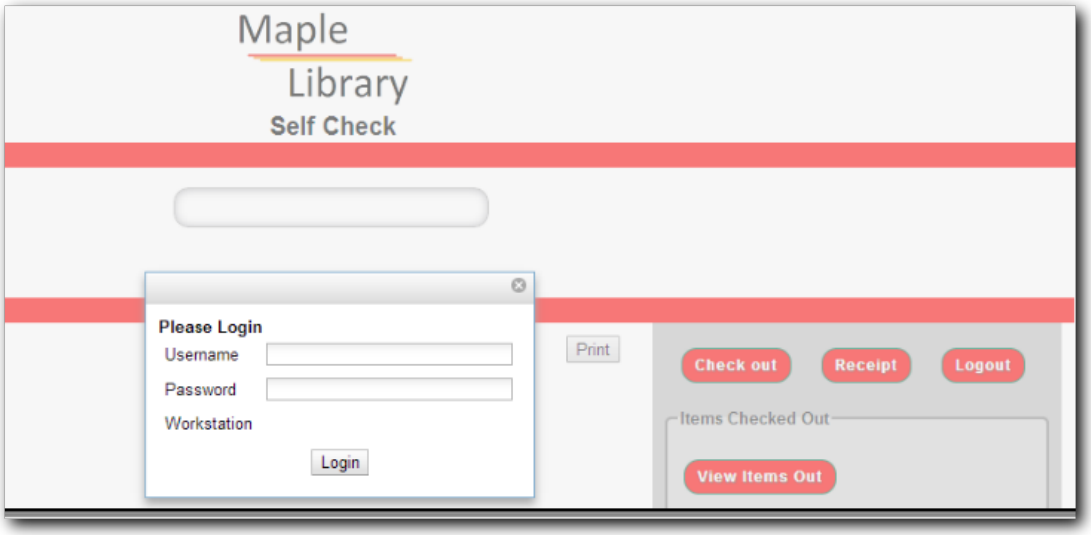
These instructions are specific to the native Evergreen Self Check. For instructions on using third party self check outs libraries should refer to the instructions provided by the third party vendors.

For information on how your library can set up and use the native Evergreen Self Check see Chapter 50, *Evegreen Self Check Administrative Set-Up*.

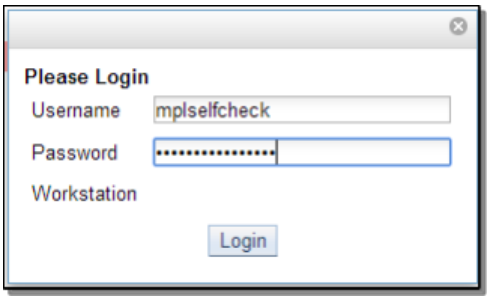
11.1. Staff Functions in the Evergreen Self Check

Turning on the Self Check

1. Open the Evergreen Self Check interface in an internet browser.



2. Enter your self check login credentials and click *Login*.



Each library is given a self check specific Local System Administrator account during set up.

Turning off the Self Check

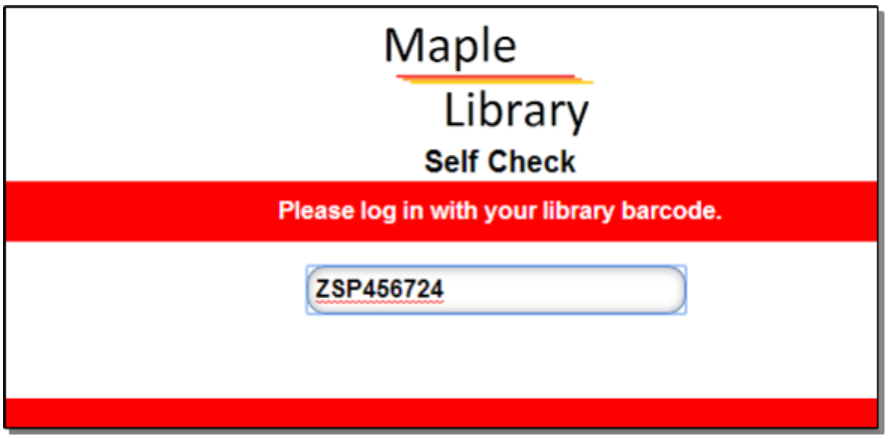
1. Close the browser.

2. Turn off the computer

Sitka Support recommends turning off all computers running the Evergreen Self Check at closing every night to avoid any conflicts with overnight processes.

11.2. Basic Check Out

1. Patron scans their barcode.



2. *Optional* Patron enters their account password.

3. Patron scans the barcodes for their items.

OR

Patron places items, one at a time, on the RFID pad.

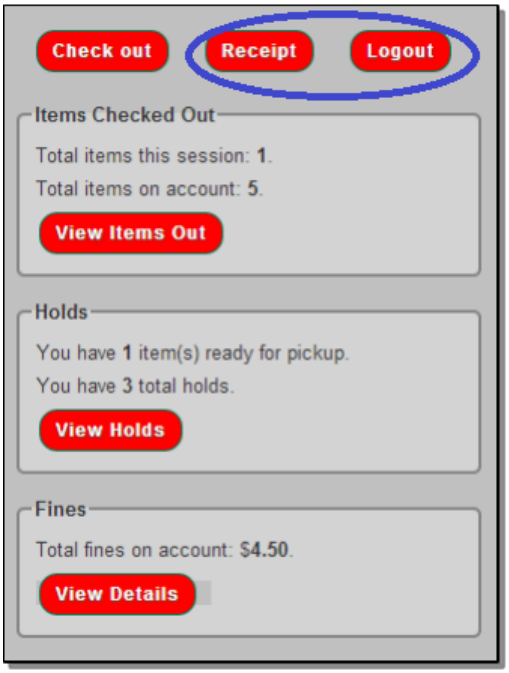
4. Items will be listed below with a check out confirmation message.

If a check out fails a message will advise patrons to see staff.

5. Patron clicks *Receipt* to print a checkout receipt and logout.

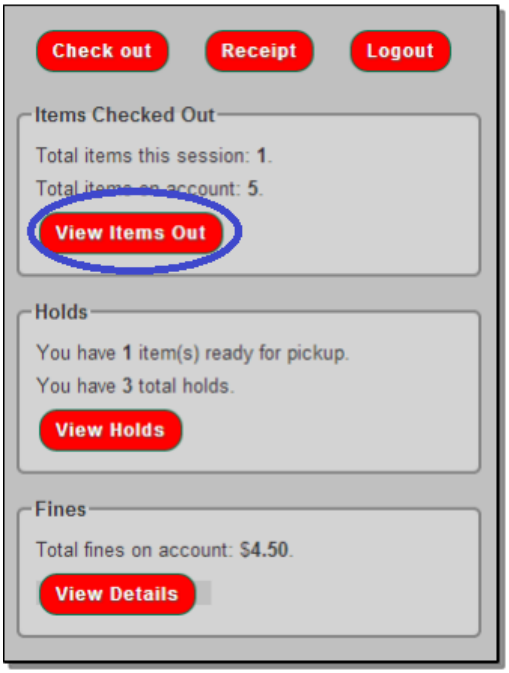
OR

Patron clicks *Logout* to logout with no receipt.



11.3. View Items Out

1. Patrons are able to view the items they currently have checked out by clicking *View Items Out*.

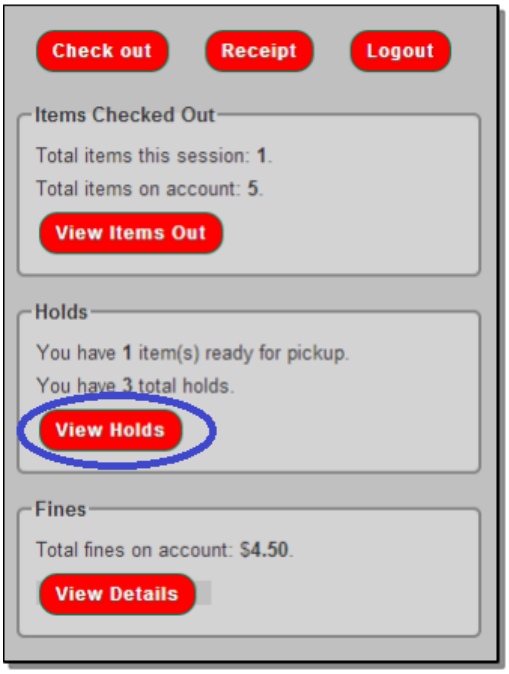


2. The items currently checked out will display with their due dates.

   Using the *Print* button patrons can print out a receipt listing all of the items they currently have checked out.

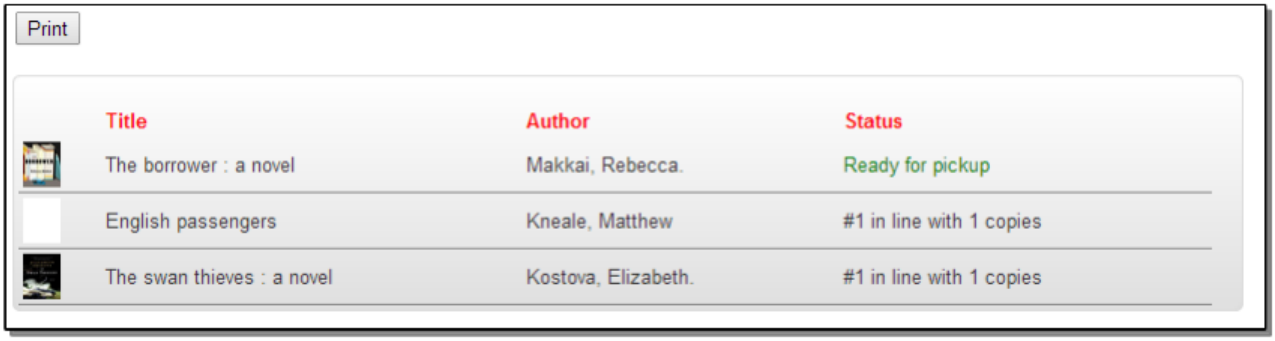
11.4. View Holds

1. Patrons are able to view their current holds by clicking *View Holds*.



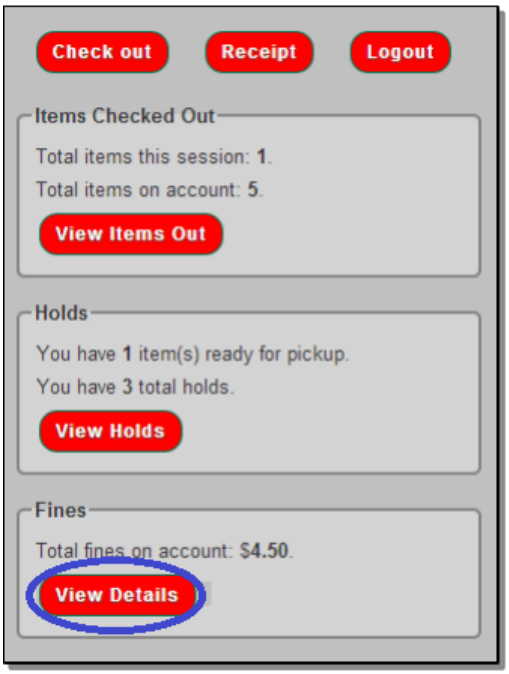
2. Items currently on hold display. Patrons can also see which, if any, items are ready for pickup.

   Using the *Print* button patrons can print out a receipt listing all of the items they currently have on hold.

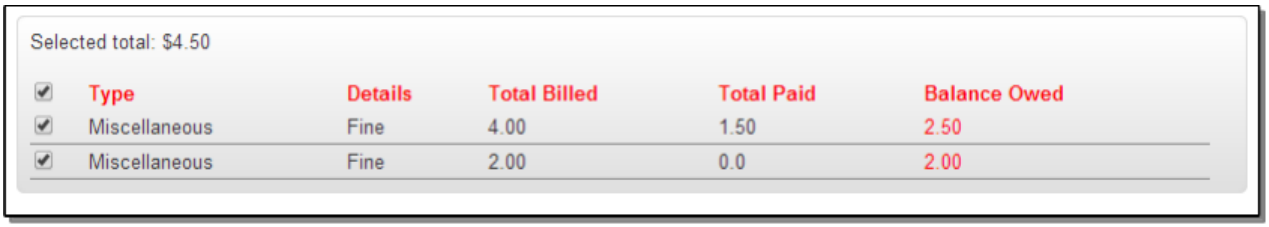


11.5. View Fines

1. Patrons are able to view the fines they currently owe by clicking *View Details*.



2. Current fines owed by the patron display. Fines cannot be paid through the self check at this time.



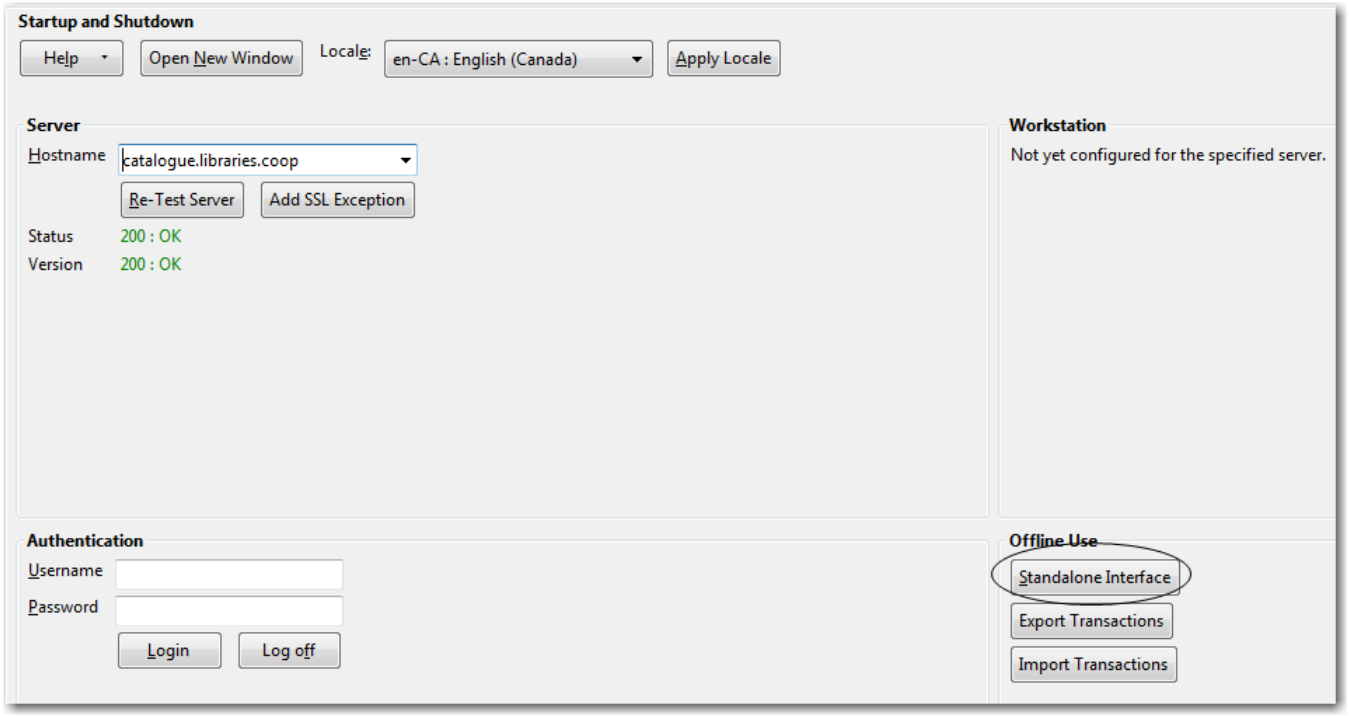
Chapter 12. Offline Transactions

Adapted with permission from original material by Georgia PINES

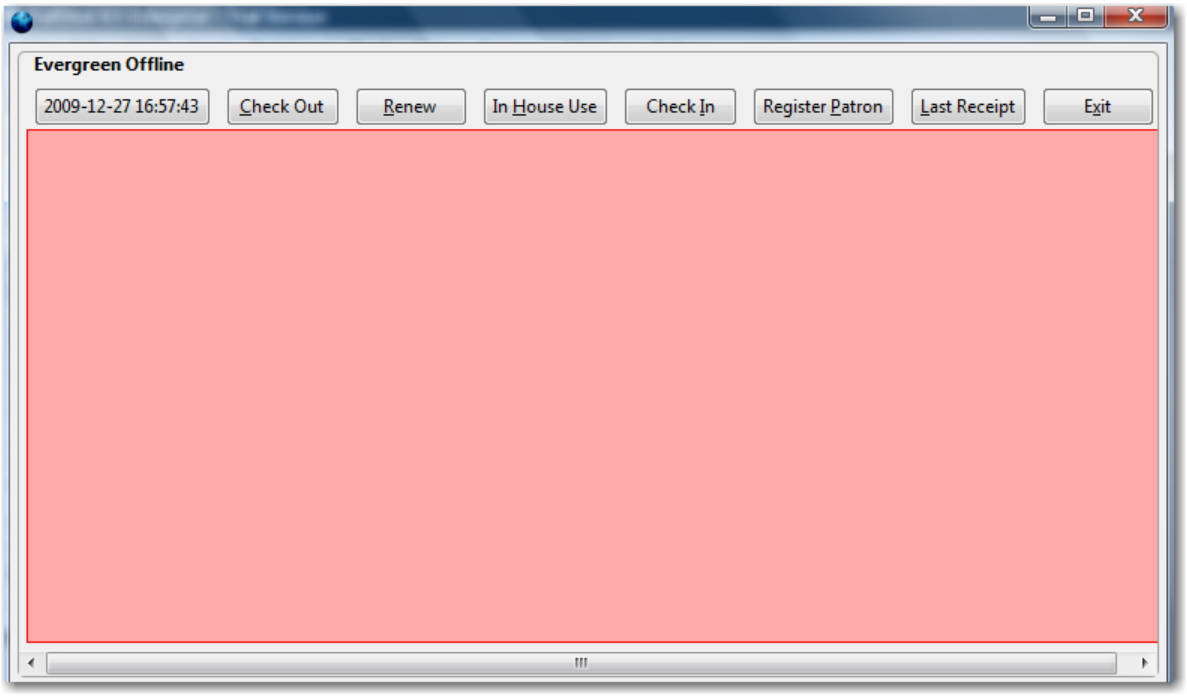
Evergreen's Standalone Interface/Offline Interface is designed to log transactions during network outage, which can be uploaded and processed once network operations are restored.

The terms “Offline Interface” and “Standalone Interface” mean the same thing - a separate program to handle simple circulation tasks while the network is down.

To access Offline Interface, go to Staff Client login screen. Click *Standalone Interface* button.



Evergreen Standalone Interface will open.

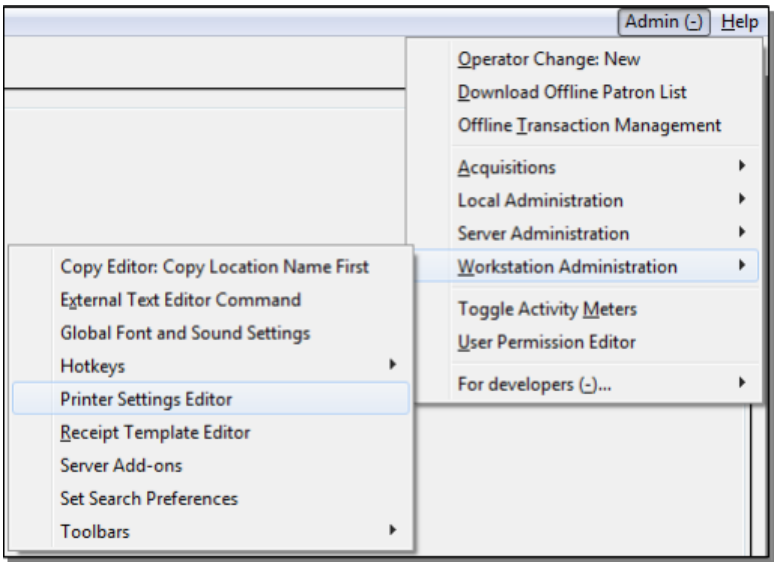


12.1. Offline Module Setup

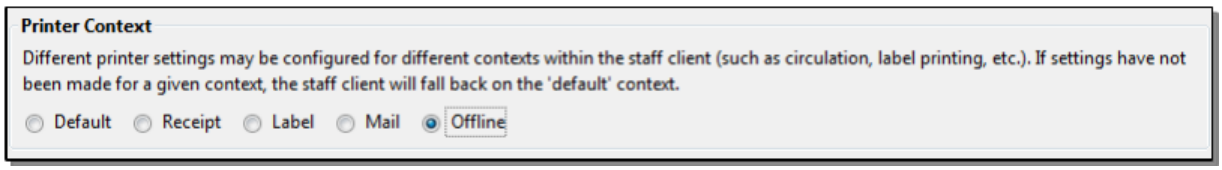
Default Offline Printer

A default offline printer must be set on each workstation to be used during offline in order for the Offline Module to print receipts.

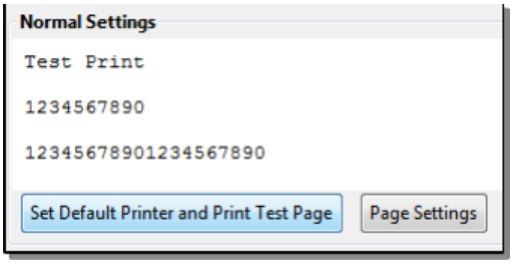
1. Select *Admin* → *Workstation Administration* → *Printer Settings Editor*.



2. Select the *Printer Context*. Set the *Offline* context on each Evergreen workstation.


Printer Context
Different printer settings may be configured for different contexts within the staff client (such as circulation, label printing, etc.). If settings have not been made for a given context, the staff client will fall back on the 'default' context.
Default
Receipt
Label
Mail
Offline

3. After choosing *Printer Context* click *Set Default Printer and Print Test Page* and follow the prompts. If successful, test output will print to your chosen printer.

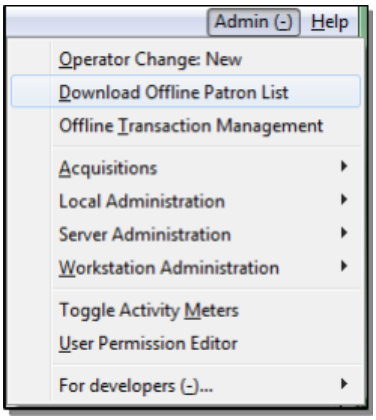


Download Offline Patron List

It is best practice to download the offline patron list every morning on any computers that would in the event that the library goes to offline checkout.

This list contains blocked, barred, and expired patrons as well as lost cards and enables the Offline Module to respond with an error message indicating the patron status at check-out time.

- Select *Admin → Download Offline Patron List*.



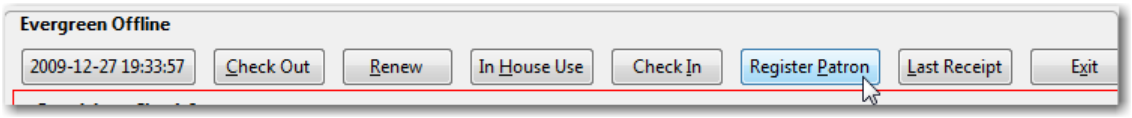
12.2. Patron Registration

Patron registration on Evergreen Offline Interface records the minimum patron information necessary to register a new patron.

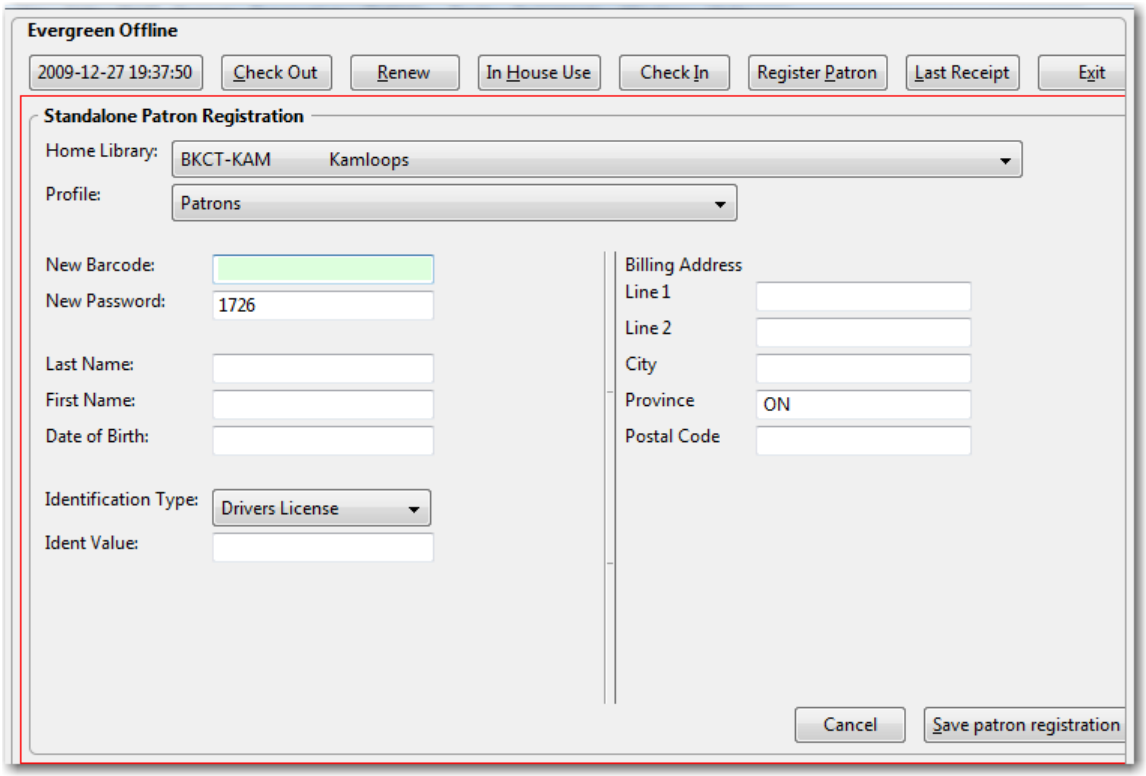
All fields, except Line 2 of Billing Address, on *Patron Registration* screen are required. If your library does not record information for any field, you need to work out a standard fake value for it, e.g. 1900-01-01 for Date of Birth.

The account password will be automatically generated. Patrons can access their account with the password after the offline transactions are uploaded and processed.

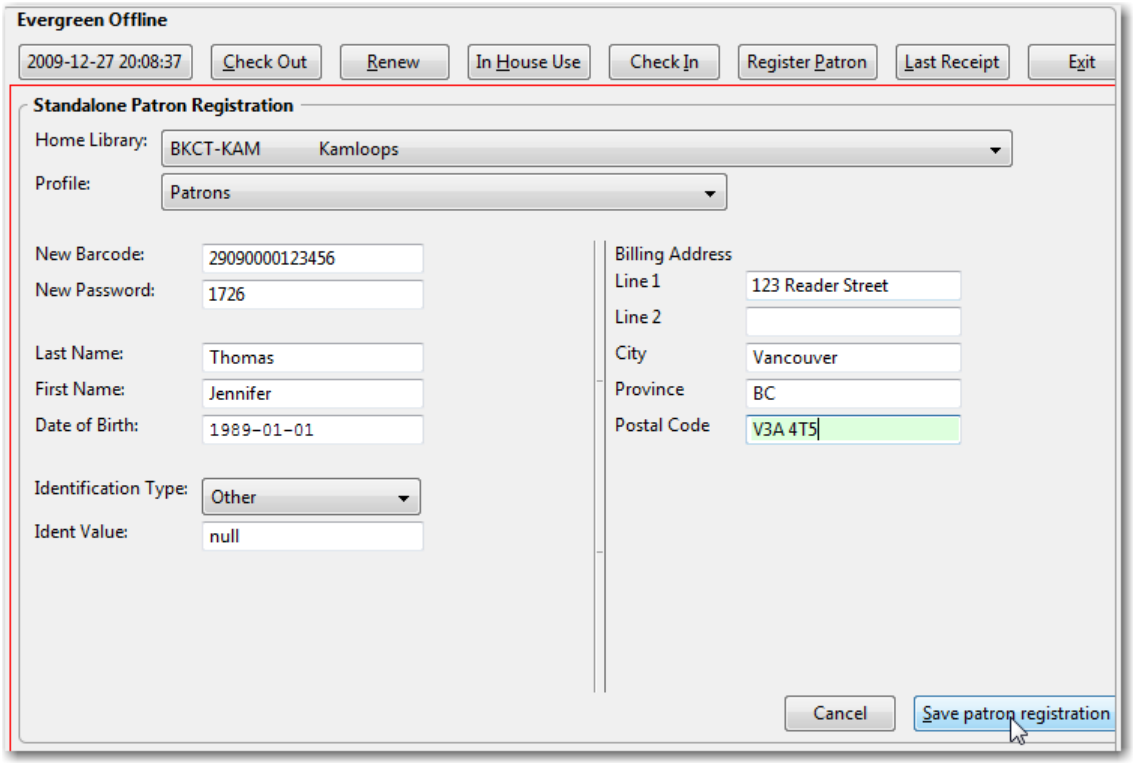
1. Click *Register Patron* on the top menu bar.



2. *Patron Registration* screen is displayed.

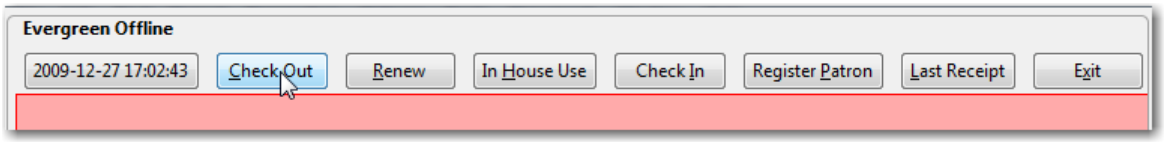


3. Fill in the form with patron information. Use the drop down list if available. Click *Save patron registration* button. Click *OK* on the confirmation pop-up window.

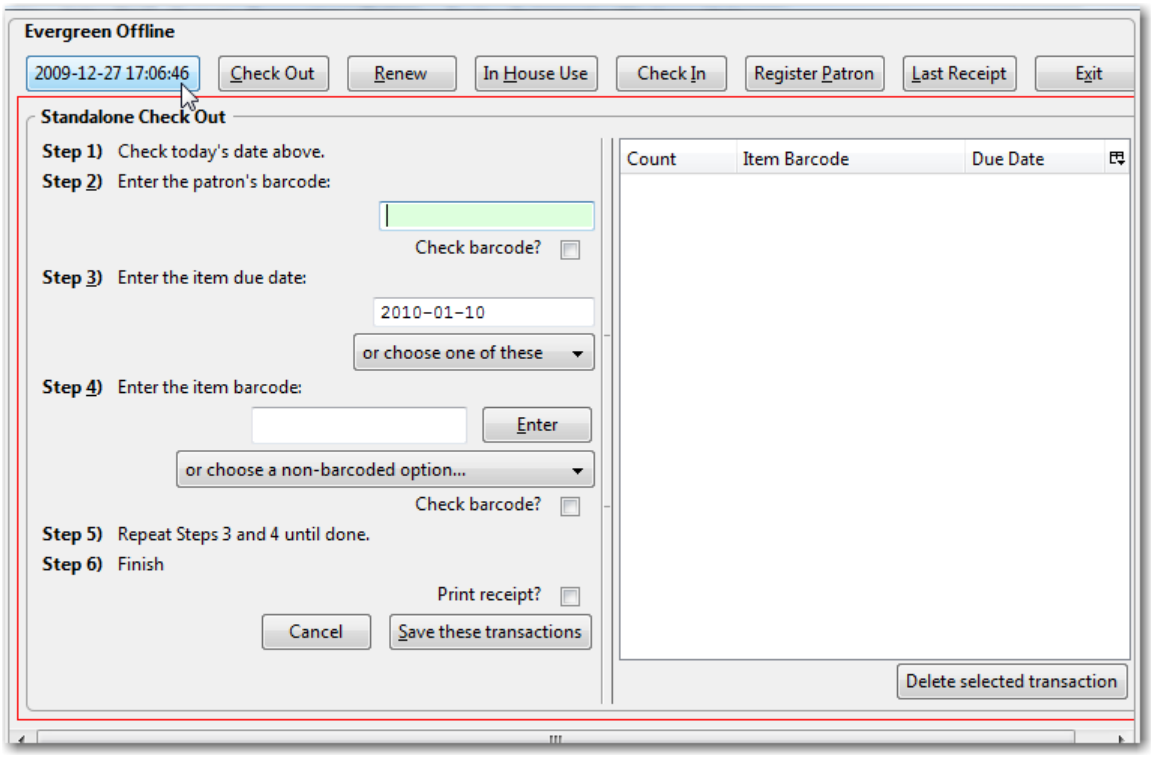


12.3. Check Out

1. Click *Check Out* button to access check out screen.

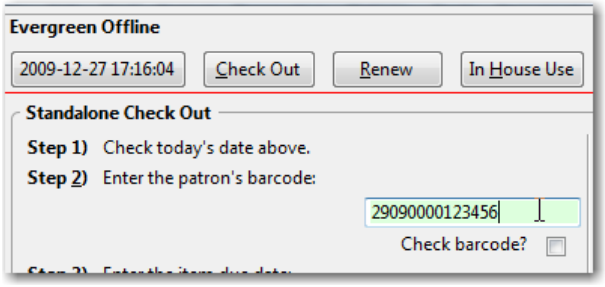


2. The Standalone Check Out screen will open.

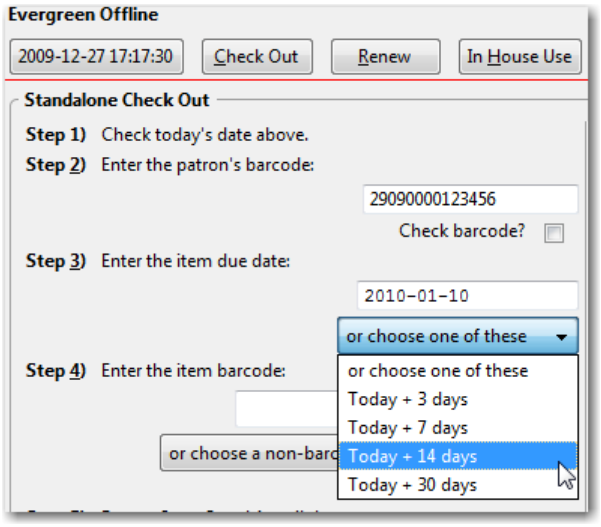


3. Make sure the date (on the left end of the menu bar) is correct.

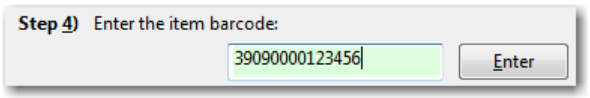
4. Scan the patron's library card barcode in *Enter the patron's barcode* box.



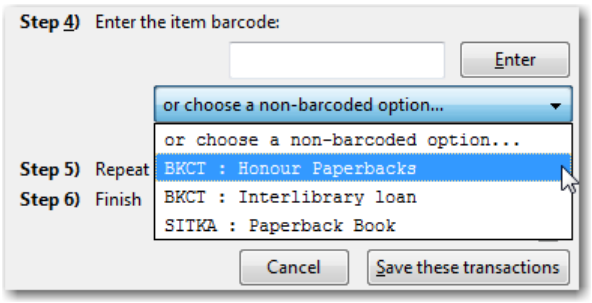
5. Check that the due date is correct. You may delete then type in a due date in *Enter the item due date* box. You may also click *choose one of these* dropdown list to select a relative due date based on the loan period.



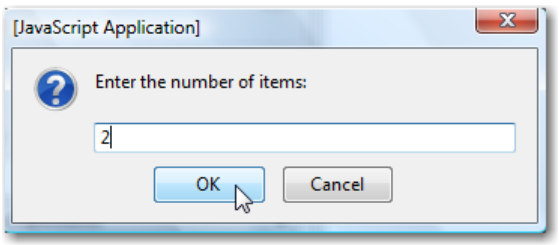
6. Scan the items' bacode in *Enter the item barcode* box. It will appear on the right side of the screen.



7. For non-catalogued items, you may also click *choose a non-barcode option* dropdown list to select a non-catalogued category.

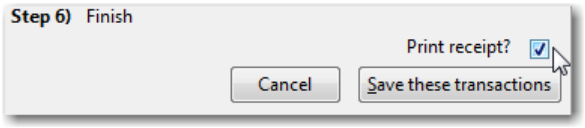


Enter the number of items you want to check out, then click *OK* on the prompt window.



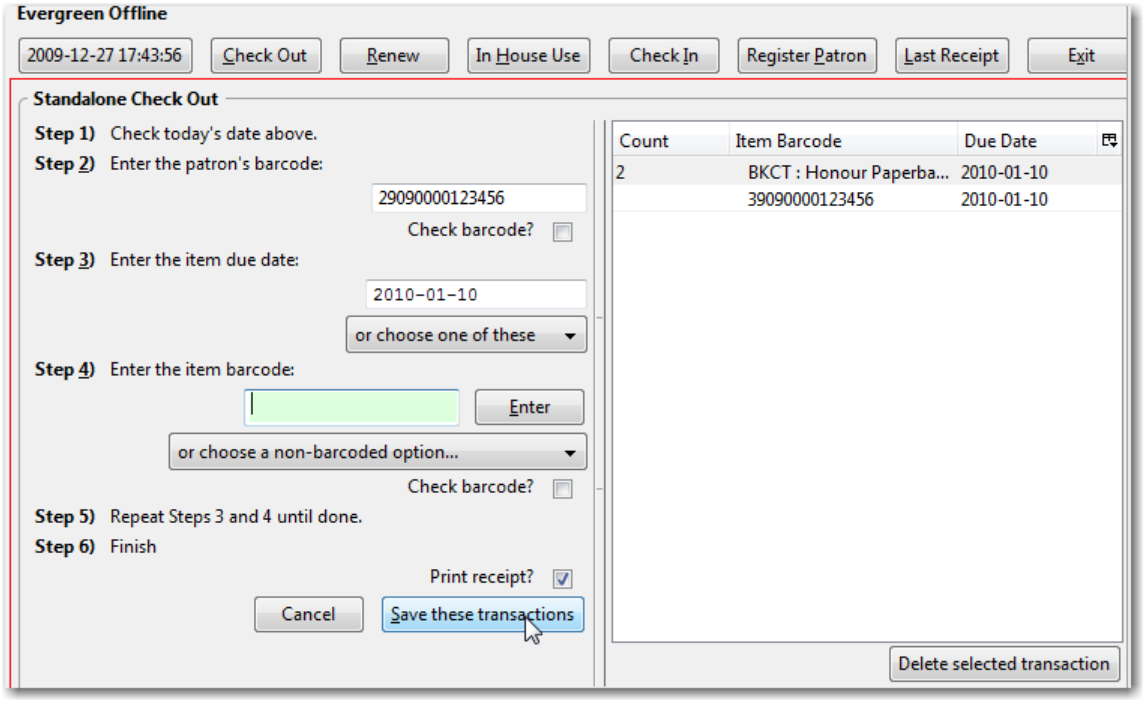
8. Scan all the items, changing the due date if necessary.

9. If you want to print a receipt, make sure the *Print receipt?* checkbox is selected.



Receipts will only print if you have previously set a default offline printer in the staff client. See Default Offline Printer for innstructions on setting the default offline printer.

10. Click *Save these transactions*.



The default dates are based on your computer settings.

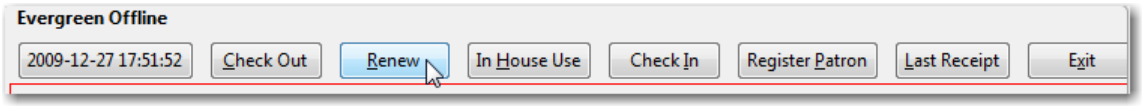
Pre-catalogued item circulation is not available on Offline Interface. If an existing pre-cat barcode happens to be used, it will be checked out with the previous author and title. If a new pre-cat barcode is attempted, an error of ASSET NOT FOUND (item not found) will be returned upon processing offline transactions.

The *Delete selected transaction* function does not currently work. Misscans need to be resolved as exceptions at this time.

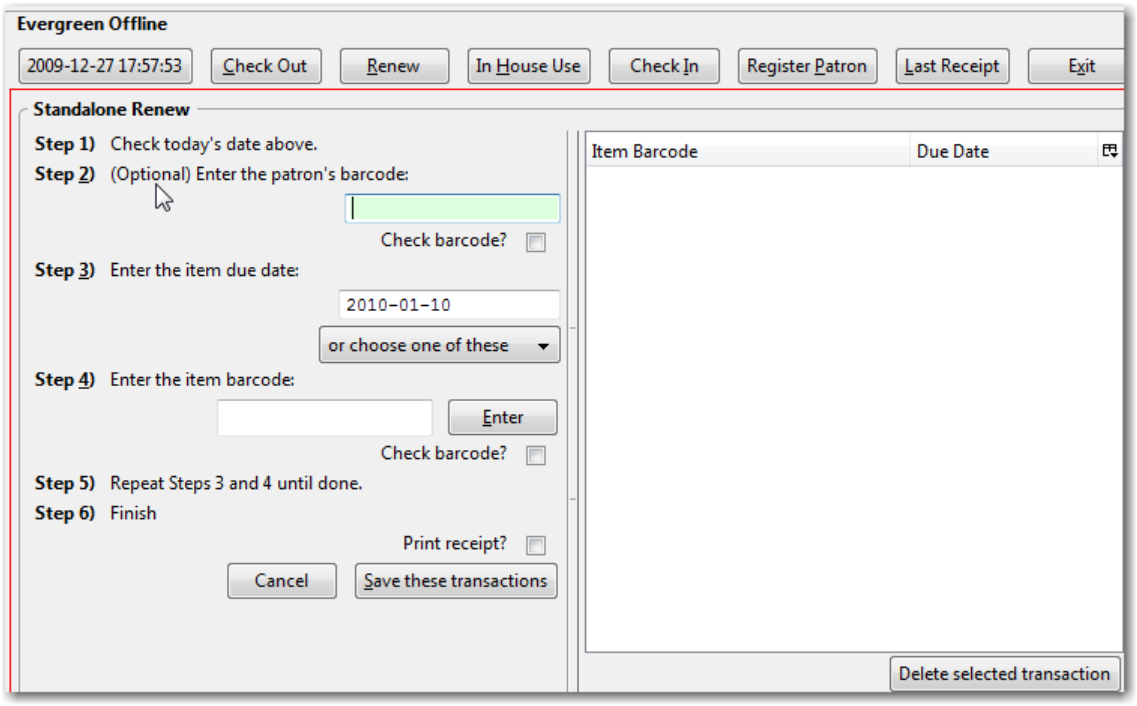
12.4. Renew

To renew, you must know items barcode number. Patron's barcode is optional.

1. To access renew function, click *Renew* button on the top menu bar.



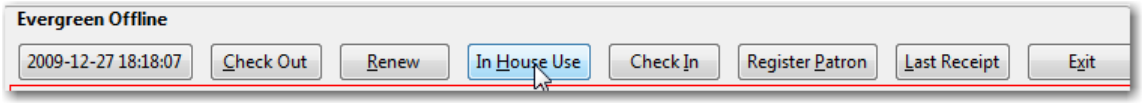
2. *Renew* screen looks very similar to *Check Out* screen. The differences are patron's barcode is optional on *Renew* screen, and non-barcoded option is not available as non-barcoded items can not be renewed.



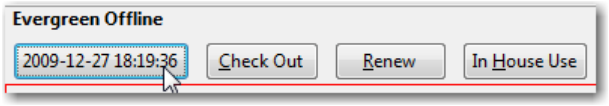
3. Follow the same procedure as checking out described above. Skip patron barcode if you do not have it.

12.5. In House Use

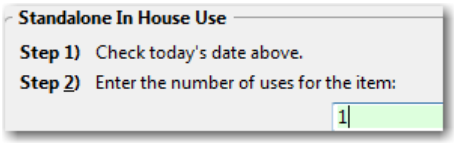
1. To access *In House Use*, click *In House Use* button on the top menu bar.



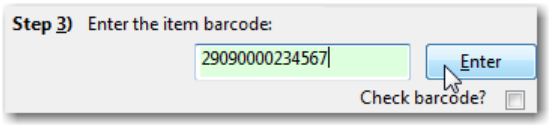
2. Make sure the date is correct.



3. Type in the number in *Enter the number of uses of the item* box.

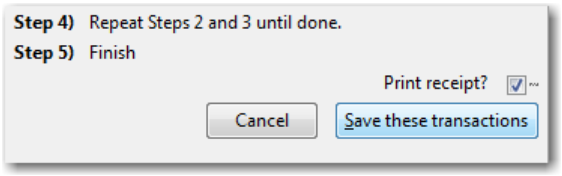


4. Scan or type in the item barcode number in *Enter the item barcode* box.



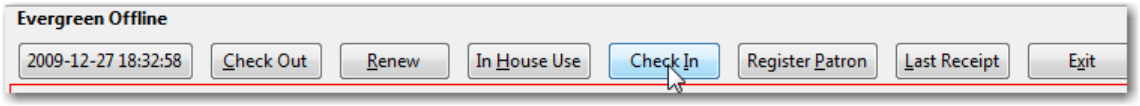
5. Repeat the above 2 steps until all items have been scanned.

6. Click *Save these transactions*. Make sure *Print receipt?* checkbox is selected if you want to print a receipt.

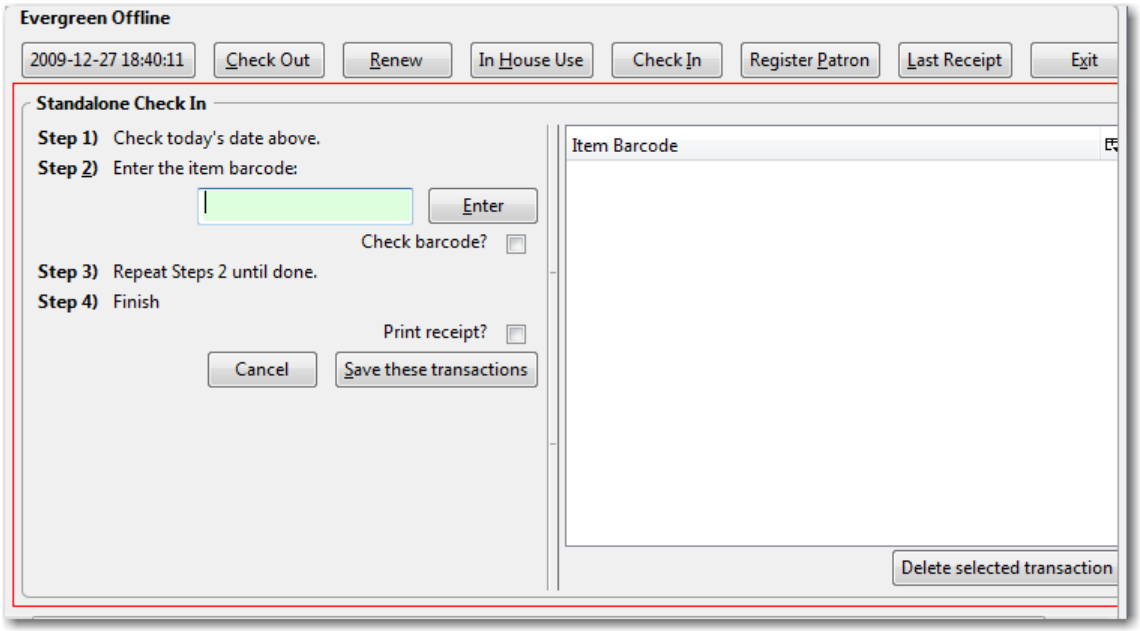


12.6. Check In

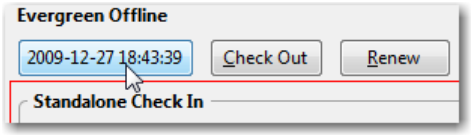
1. Click *Check In* button on the top menu bar.



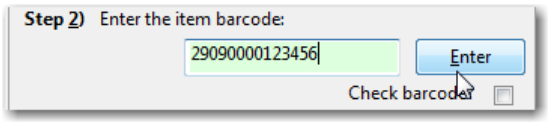
2. *Check In* screen will open.



3. Make sure the date is correct.

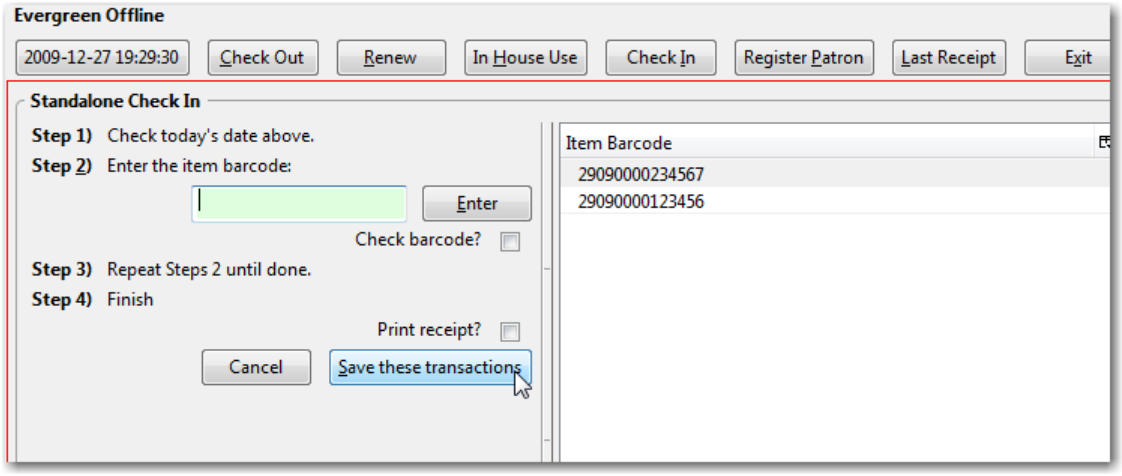


4. Scan the items barcode in *Enter item barcode* box. The number will be displayed on the right side fo the screen.



5. Scan all items you want to check in.

6. Click *Save these transactions*. If you need to print a receipt, make sure *Print receipt?* checkbox is selected before you save the transactions.



Without access to Evergreen database, items on holds or with special status will not be captured in offline mode. Sitka Support Team recommends libraries not use check in function on Standalone Interface if possible.

12.7. Uploading offline transactions

Once you are able to connect to the server, you need to upload the offline transactions. It is good practice to do this as soon as possible, but if the local system administrator isn't on site for a day or two do not panic.

The terms *Offline Interface* and *Standalone Interface* mean the same thing - a separate program to handle simple circulation tasks while the network is down.

Once you can connect to the server, there are 3 steps to uploading offline transactions:

1. Create a session: to be done by local system administrators at an administration workstation.
2. Upload transactions to a session: to be done by circulation staff at circulation workstations.
3. Process the uploaded transactions: to be done by local system administrators at an administration workstation.

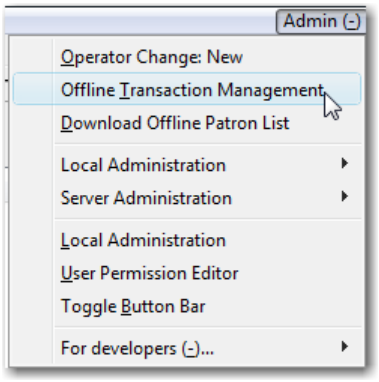
Once the network has come back up, a local system administrator must first create a session before uploading transactions. Then, staff can upload transactions from each of the workstations used in offline circ to that session. Once all of the branch workstations have uploaded their transactions to the session, the local system administrator will process all the transactions in the session at once.

Circulation Staff uploading transactions to the session does not put the transactions into the Evergreen database. It just copies over the offline transaction file saved in individual local workstations to the Evergreen server. The transactions will not be sent to the Evergreen database until the local system adminsitrator processes the session.

Create a Session

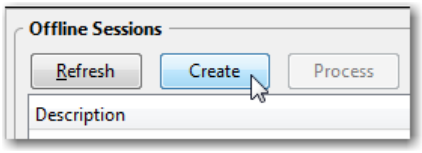
1. Log into Evergreen with a local system administrator username and password.

2. From the menu bar, select *Admin (-)* → *Offline Transaction Management*.

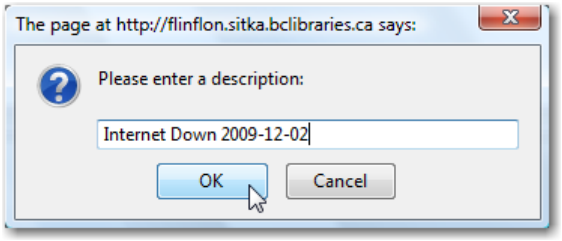


3. The *Offline Transactions* screen will open. Previously created sessions will be listed in the Offline Sessions section. Otherwise, the Offline Sessions section will be blank.

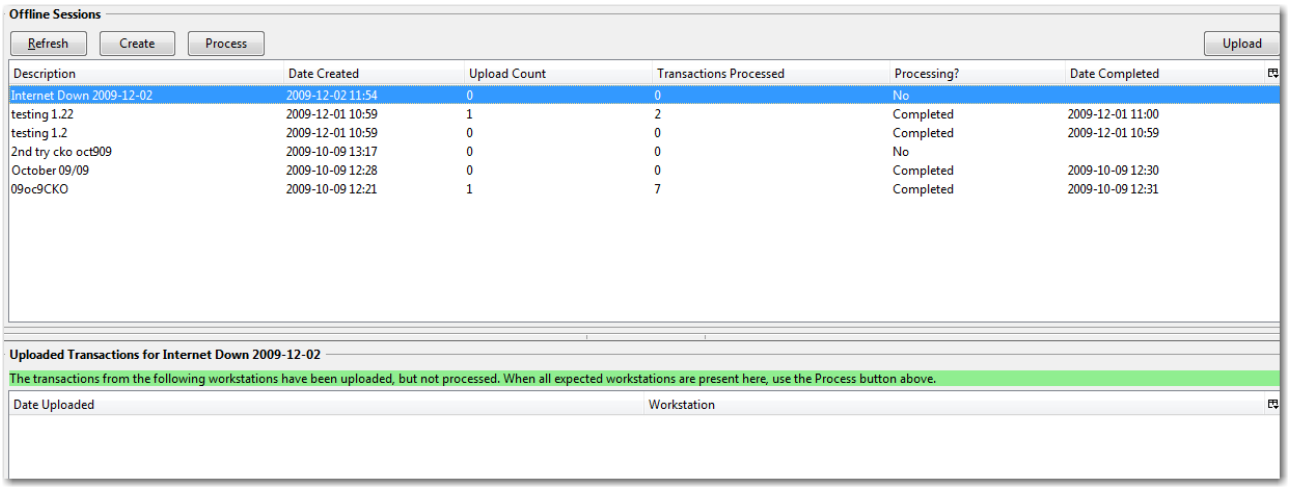
4. In the upper *Offline Sessions* section, click on the *Create* button to create a new session.



5. Enter a name for the session, like “Internet Down 2009-12-02”. Click *OK*.



6. In the *Offline Sessions* section, highlight the session you just created. An *Uploaded Transactions* section will appear in the bottom of the screen. Initially, this section will be empty.



7. Inform library staff that the session has been created and what the session name is.

Upload Workstation Transactions to a Session

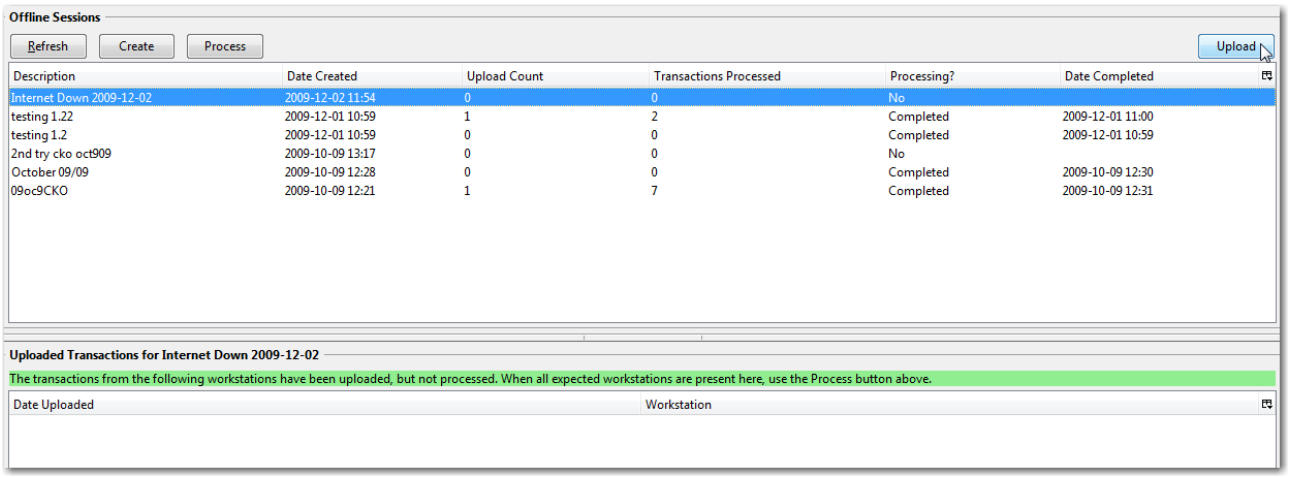
Wait until the local system administrator has created a session and told you that it's ready for your upload. There may be several sessions shown on the *Offline Transaction Management* screen, so you will need the name of the correct session from your local system administrator.

1. Log into Evergreen with your regular username and password.

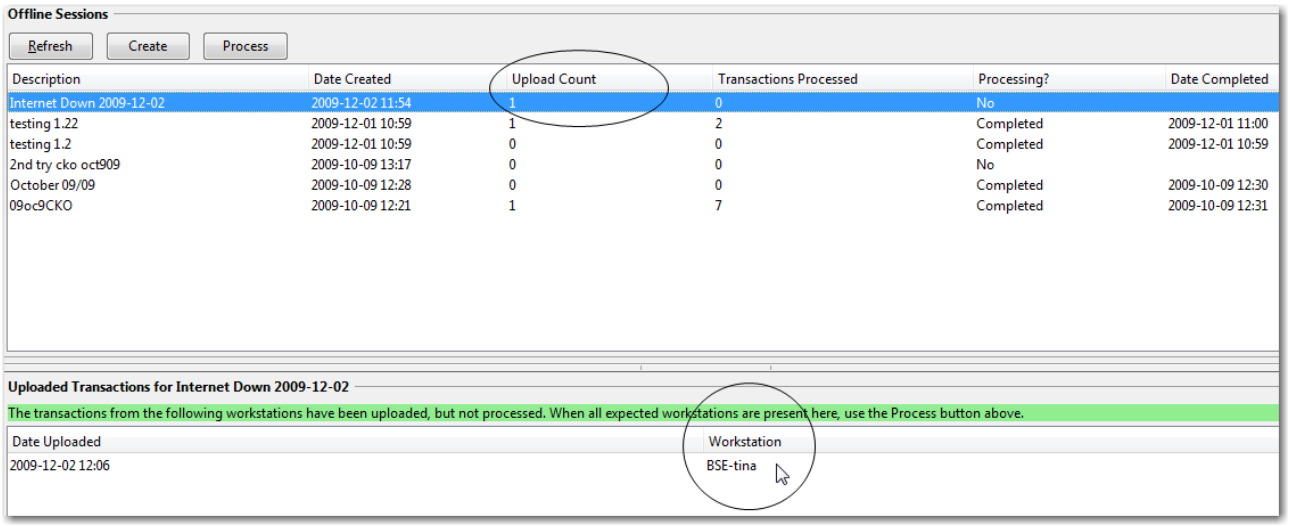
2. From the menu bar, select *Admin (-)* → *Offline Transaction Management*.

3. The *Offline Transactions* screen will open. You should see at least one session in the *Offline Sessions* section. You may see old sessions listed there, as well.

4. In the upper *Offline Sessions* section, highlight the correct session, then click *Upload*.



5. When the uploading is finished,select the session in Offline Sessions section. Now the value in the *Upload Count* column should have been increased by 1. Your workstation should be listed in *Uploaded Transactions* section now.



6. Inform your local system administrator that your transaction has been uploaded to the session.

You will need to do this for each workstation you have used for offline circulation. If your library has more than one workstations that have been used for offline transactions you will see the other workstation sessions that have already been uploaded.

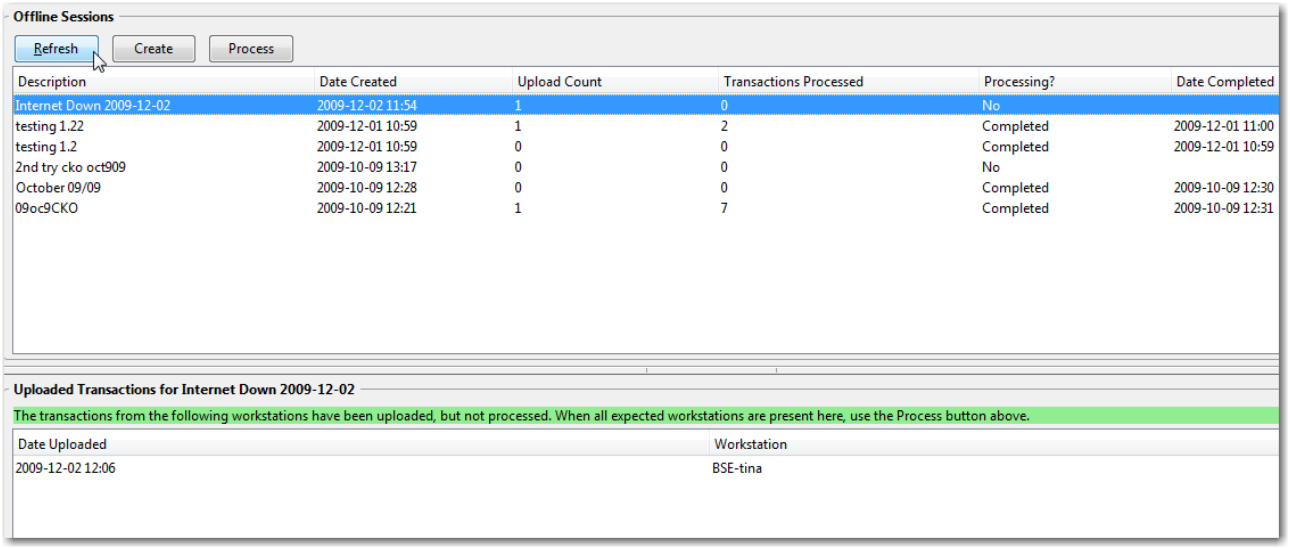
Process the Transactions

Wait until all the appropriate staff workstations have uploaded their transactions to your session. You should see the workstations listed in the *Uploaded Transactions* section. You'll need to be logged into Evergreen as a local system administrator to do the processing step.

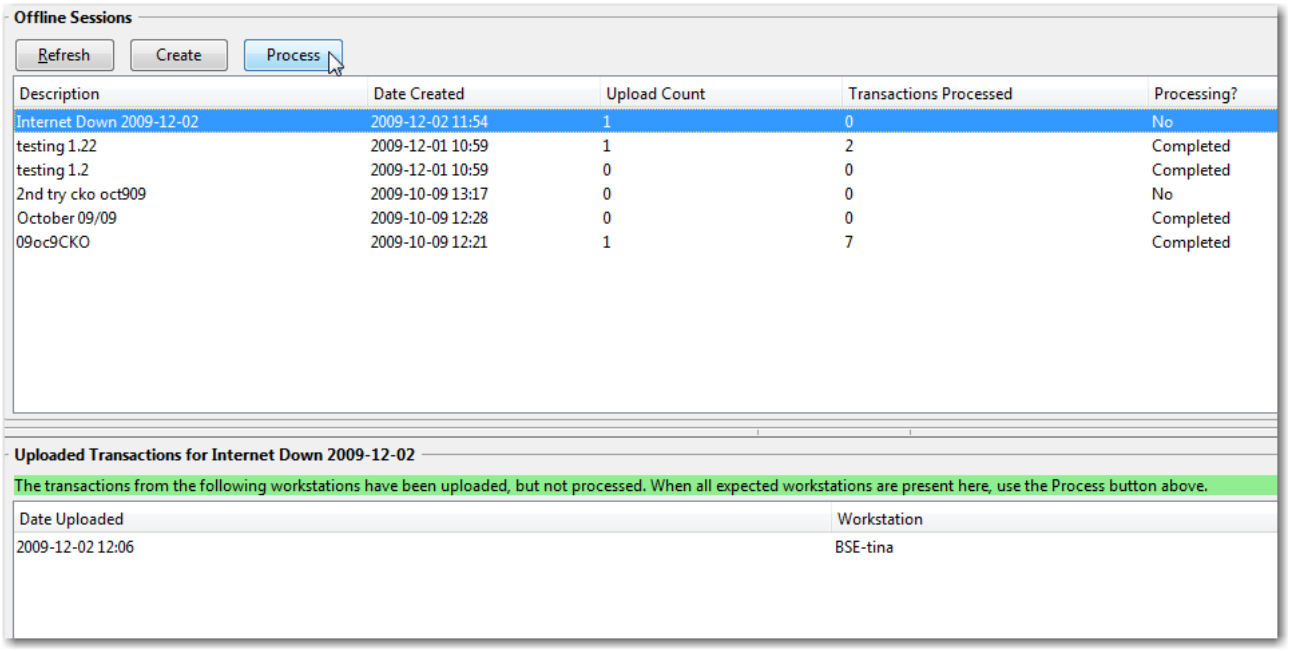
1. Log into Evergreen with a local system administrator's username and password.

2. From the menu bar, select *Admin (-)* → *Offline Transaction Management*.

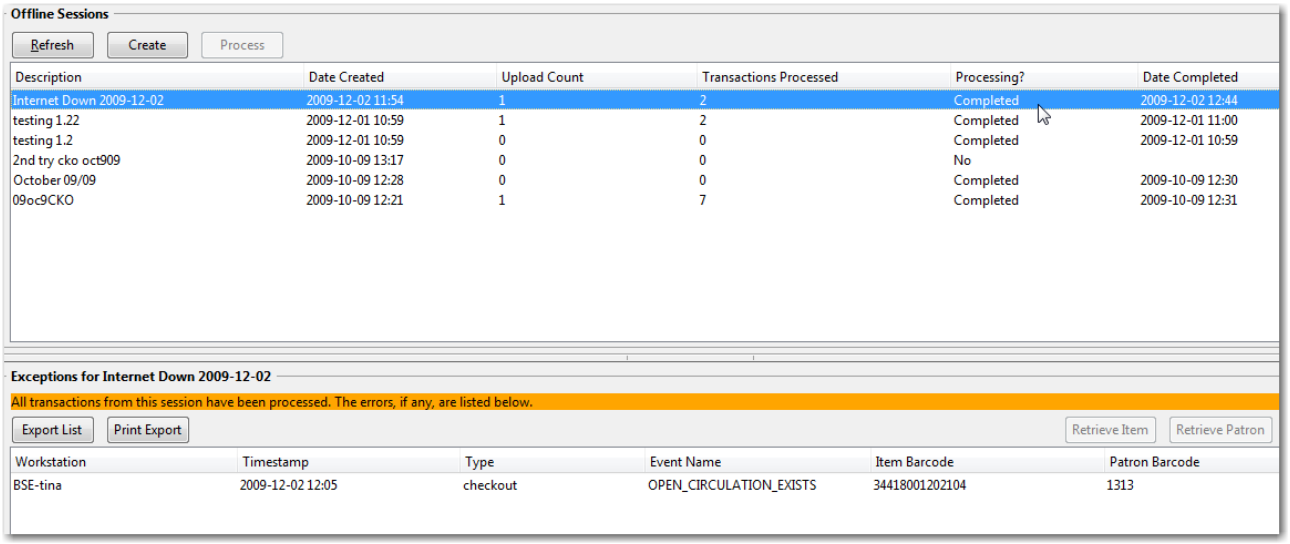
3. Highlight the correct session and, if necessary, *Refresh* to verify all the appropriate workstations have uploaded their transactions to your session.



4. Click on the *Process* button.



5. The processing may take a while, depending on how many transactions you have done. Click the *Refresh* button to check the status. The processing is complete when the *Processing?* column shows *Completed*.



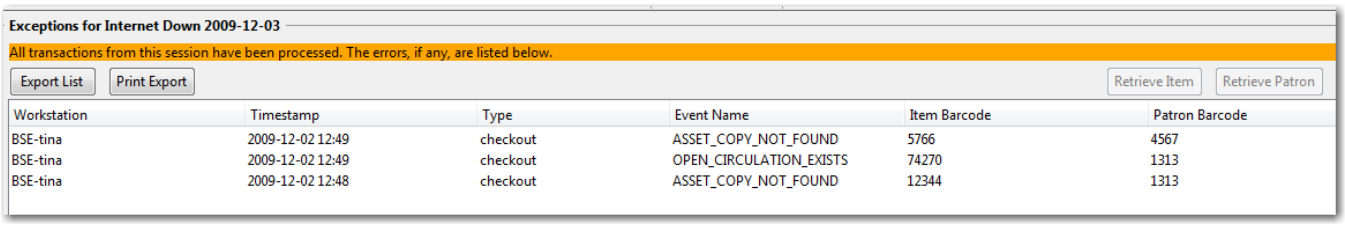
The number in the *Transactions Processed* column is equal to the number of items checked out or checked in. For example, if there are 5 transactions processed this could be 5 items checked out, or 3 items checked in and 2 items checked out, or 5 items checked in.

Exceptions

Exceptions are problems that were encountered during processing. For example, a mis-scanned patron barcode, an open circulation, or an item that wasn't checked in before it was checked out to another patron, would be listed as an

exception. Those transactions causing exceptions may not be loaded into Evergreen database. Staff should examine the exceptions and take necessary action.

The example below shows several exceptions:



These are a few notes about possible exceptions. It is not an all-inclusive list.

1. Checking out a DVD with the wrong date (leaving due date set at +2 weeks instead of +1 week) doesn't cause an exception.

2. Overdue books are not flagged as exceptions.

3. Checking out a reference book doesn't cause an exception.

4. Checking out an item belonging to another library doesn't cause an exception.

5. The *Standalone Interface* doesn't recognize books on hold, no exceptions will be generated for that.

6. The *Standalone Interface* will recognize blocked, barred, and expired patrons as well as lost cards, IF you have recently done an *Admin (-)* → *Download Offline Patron List* on the workstation on which you're using the *Standalone Interface*. You will get an error message indicating the patron status from within the *Standalone Interface* at check-out time.

7. **ROUTE-ITEM.** Indicates the book should be routed to another branch or library system. You'll need to find the book and re-check it in (online) to get the *Transit Slip* to print.

8. **COPY_STATUS_LOST.** Indicates a book previously marked as lost was found and checked in.

9. **CIRC_CLAIMS_RETURNED.** Indicates a book previously marked as claimed-returned was found and checked in.

10. **ASSET_COPY_NOT_FOUND.** Indicates the item barcode was mis-scanned/mis-typed.

11. **ACTOR_CARD_NOT_FOUND.** Indicates the patron's library barcode was mis-scanned/mis-typed.

12. **OPEN_CIRCULATION_EXISTS.** Indicates a book was checked out that had never been checked in.

13. **MAX_RENEWALS_REACHED.** Indicates the item has already been renewed the maximum times allowed (or it’s a video/DVD).

Part III. Cataloguing

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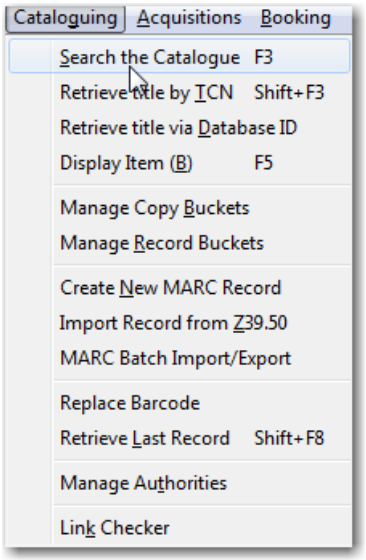
Chapter 13. Searching the Database for Cataloguing Purposes

It is critical to search the database before adding titles, volumes, or copies. Good practice is to assume the item you are adding already exists, and to do an exhaustive search for the item before cataloguing it. By doing so, you will discover whether you need to add your item to an existing title record, or if you need to import or create a new title record. It is very important that you scope your cataloguing searches to the entire Sitka database, either at the time of each search or via Workstation or My Account preferences.

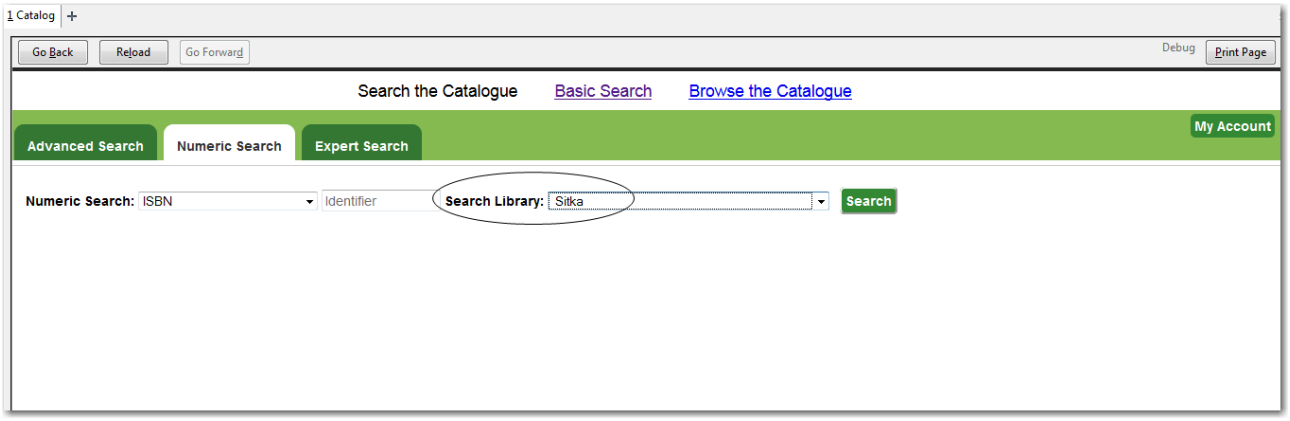
You can set workstation search preferences to configure default search location and preferred search library and you can choose to have Numeric Search or MARC Expert search be the default advanced search view. These workstation preferences override account login preferences set in My Account. For cataloguing workstations it is recommended that the Default Search Library be set to Sitka. This will ensure staff using those workstations are always searching all of Sitka.

13.1. Advanced/Numeric Search

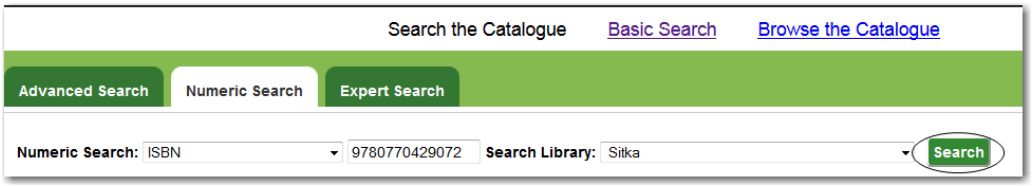
1. To search the catalogue for holdings select *Cataloguing* → *Search the Catalogue*, or *Search* → *the Catalogue*, or press **F3**.



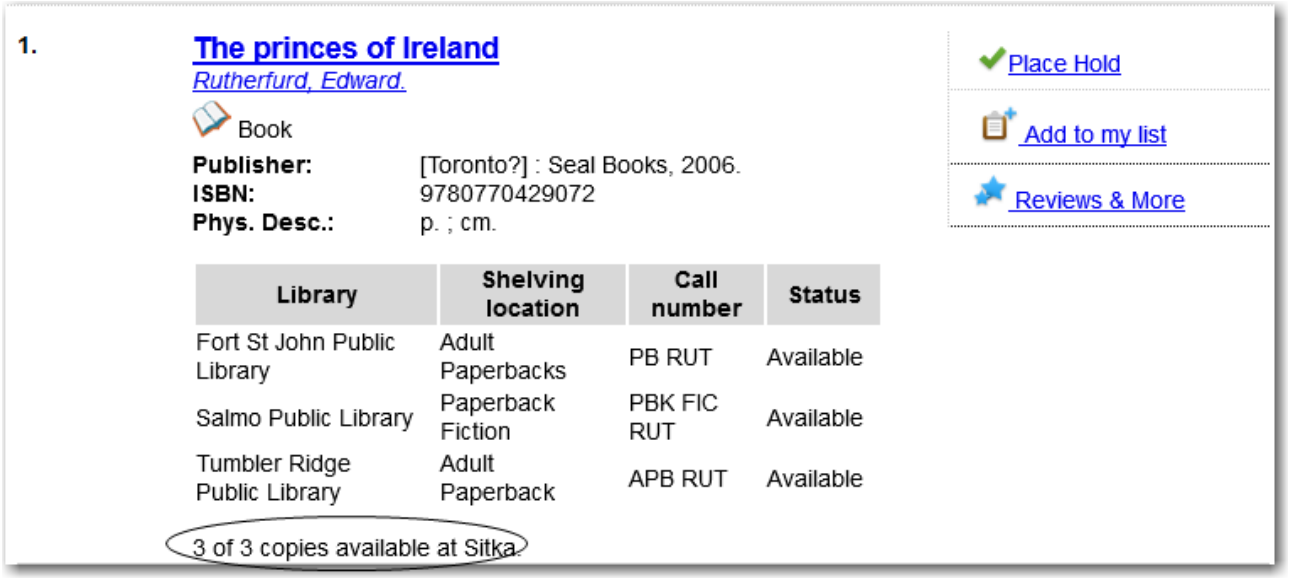
2. The advanced search screen is displayed. In this example the search screen defaults to the *Numeric Search* page You can customize the look of this screen via Workstation Administration. In this example note the search library is set to Sitka. A cataloguer must ensure they are searching the entire Sitka database.



3. Enter your search criteria and click *Search*.

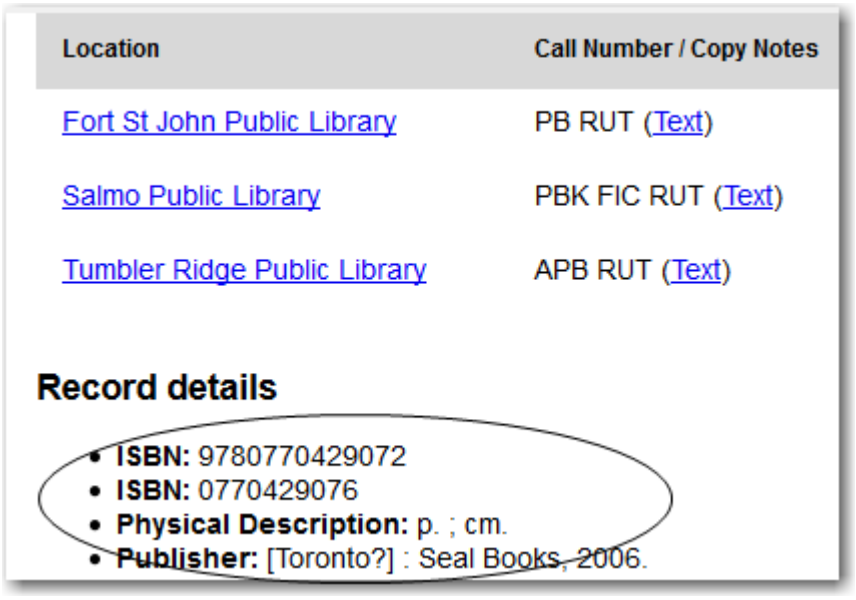


4. In this example, the item in hand has 3 copies in Sitka.

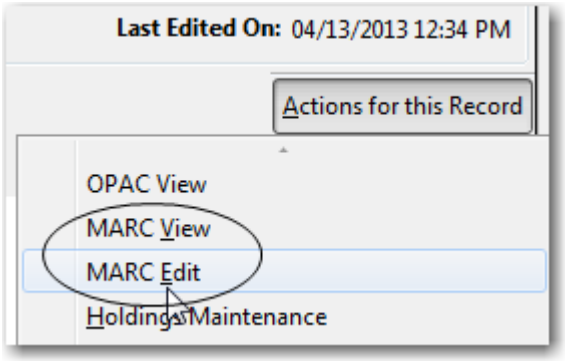


5. To access the record, click on the title link.

6. Confirm bibliographic data as displayed in the brief record. If satisfied that the record matches the item in hand, you can proceed to add holdings as described in Chapter 14, *Adding Holdings to Existing Records in the Sitka Database*.



7. You may also choose to view MARC record from this screen by clicking on *MARC Record* button below record summary, or selecting *Actions for this Record* > *MARC View* or *MARC Edit* at top right of record.



8. This presents detailed bibliographic data to help you determine whether the record matches the item in hand.

LDR			00691nam a22002412 4500
001			103621550
003			SITKA
005			20120606061320.0
008			060407s2006 xx a 000 0 eng d
020			‡a 9780770429072
020			‡a 0770429076
040			‡d UtOrBLW
100	1		‡a Rutherfurd, Edward.
245	1	4	‡a The princes of Ireland / ‡c Edward Rutherfurd.
260			‡a [Toronto?] : ‡b Seal Books, ‡c 2006.
300			‡a p. ; ‡c cm.
490	1		‡a The Dublin saga
650		0	‡a Historical fiction.
852	1		‡9 12.99 ‡h PB ‡i RUT ‡p BFSJ101838
830		0	‡a Dublin saga.

It is possible to search ISBNs by keyword, but results may not be exhaustive. We recommend using Numeric Search as described in this lesson.

If an OCLC number is nine digits then Evergreen uses “ocn” as a prefix. For example: ocn123456789.

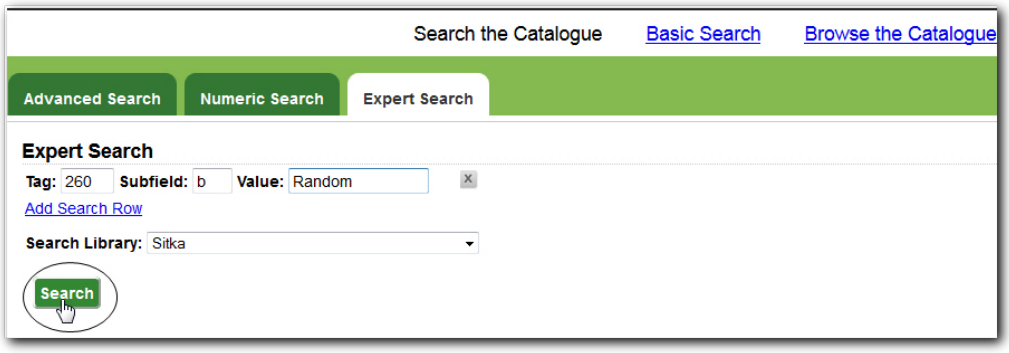
If an OCLC number is less than 8 digits then Evergreen uses “ocm” as a prefix. In addition Evergreen will automatically prefix the number with zeros so that it is nine digits. For example: ocm01234567, or ocm00123456

If searching a LCCN do not use a hyphen, add a “0” in place of a hyphen, e.g. 2001001234

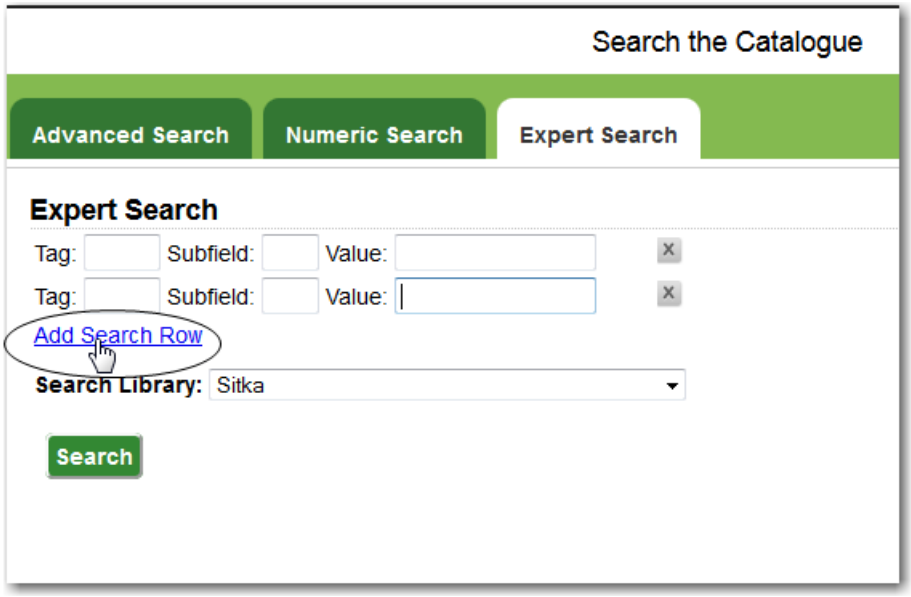
13.2. MARC Expert Search

1. To search the catalogue for holdings select *Cataloguing* → *Search the Catalogue*, or *Search* → *the Catalogue*, or press **F3** and click on *Expert Search* tab.

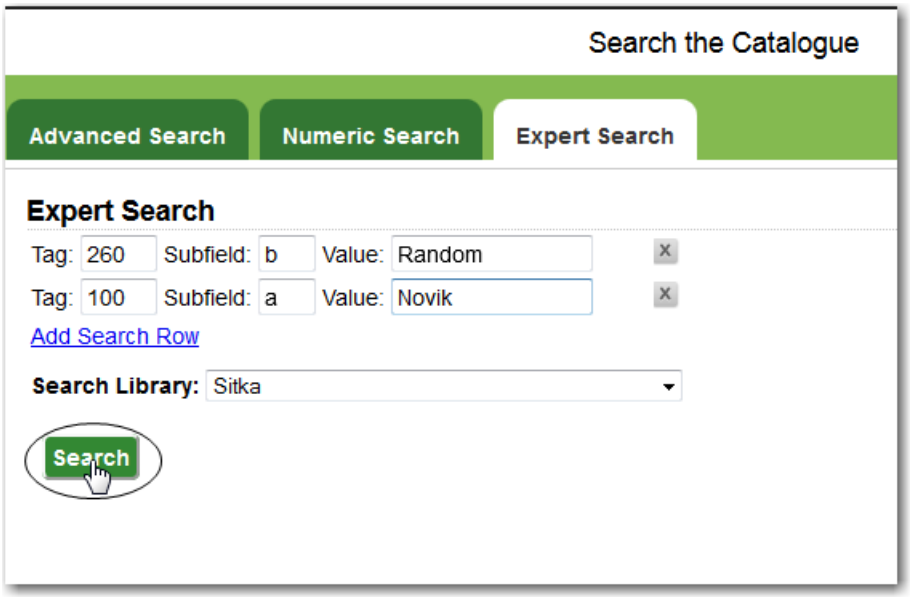
2. Enter tag definitions and search criteria and click *Search*.



3. You may search multiple tags by clicking *Add Search Row*.



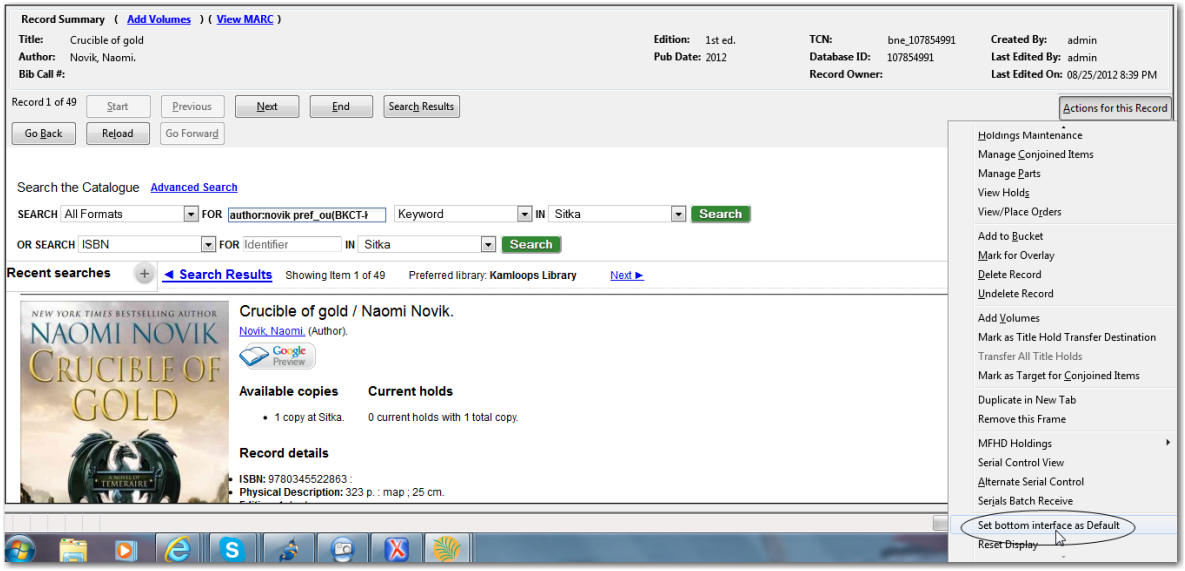
4. You may now search multiple tags.



5. Matching records are retrieved. This example is the MARC view of one result.

LDR 00604cam a22001812 4500
005 20070516161122.0
008 060829s xx 000 0 eng d
020 ‡a9780739468715 : ‡c$35.00
040 ‡aBFN ‡cBFN
100 1 ‡aNovik, Naomi.
245 1 0 ‡aTemeraire: In the service of the King : ‡bHis Majesty's Dragon / Throne of jade / Black Powder War.
260 ‡aRandom : ‡bNew York, ‡c2006.
440 0 ‡aNapoleonic Wars ; ‡v#1/2/3
653 ‡aFantasy - Alternate History.
700 1 ‡cHis Majesty's Dragon / Throne of jade / Black Powder War.

You can manipulate the view during a session, and set a default view, by clicking on *Actions for this Record* on right of screen. Selecting *Set bottom interface as Default*, as in this example, sets the current OPAC View as the default. Next time when you click a title on the resut list, the record will be displayed in this default view.



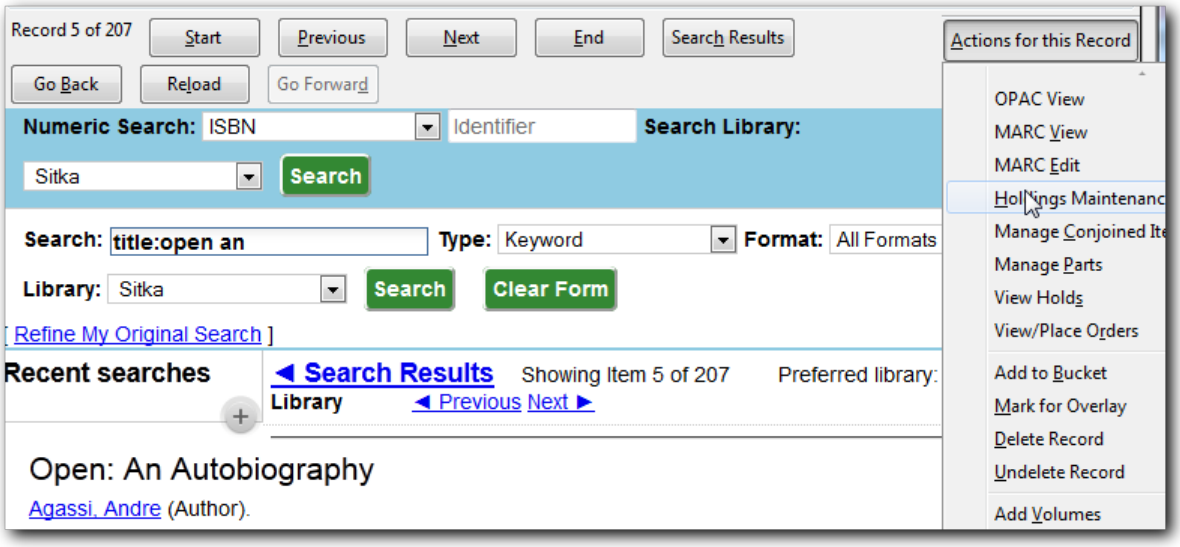
Chapter 14. Adding Holdings to Existing Records in the Sitka Database

14.1. Adding holdings to title records

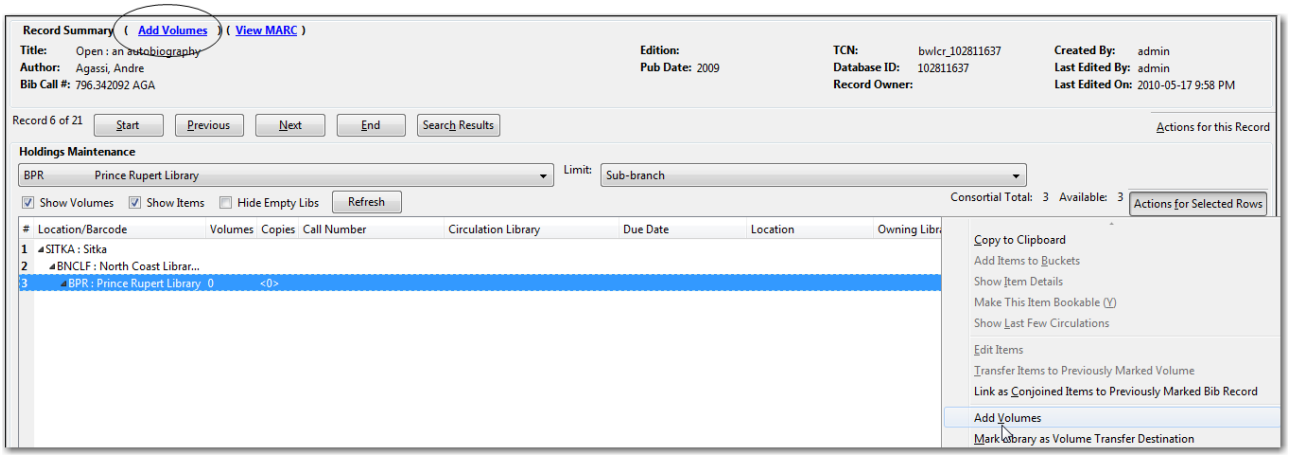
Evergreen has a unified volume/copy creator that allows you to create volumes and copies in a unified screen. This function consolidates the process of creating volume and copy records. You must configure this, and whether you want a horizontal or vertical layout, in Library Settings. See Chapter 48, *Local Administration Menu* The examples here demonstrate use of the unified volume/copy creator with a vertical layout. There is also the ability to pre-configure call number prefixes and suffixes, via the Admin menu.

1. Search the catalogue for a record that matches the item in hand, as described in Chapter 13, *Searching the Database for Cataloguing Purposes*. If you do not find a match, refer to the Sitka Cataloguing Policy at http://sitka.bclibraries.ca/governance/sitka-policy/ for recommendations on required procedures. If you do find a match, proceed to next step.

2. When the record details are loaded, select *Actions for this Record* → *Holdings Maintenance*.



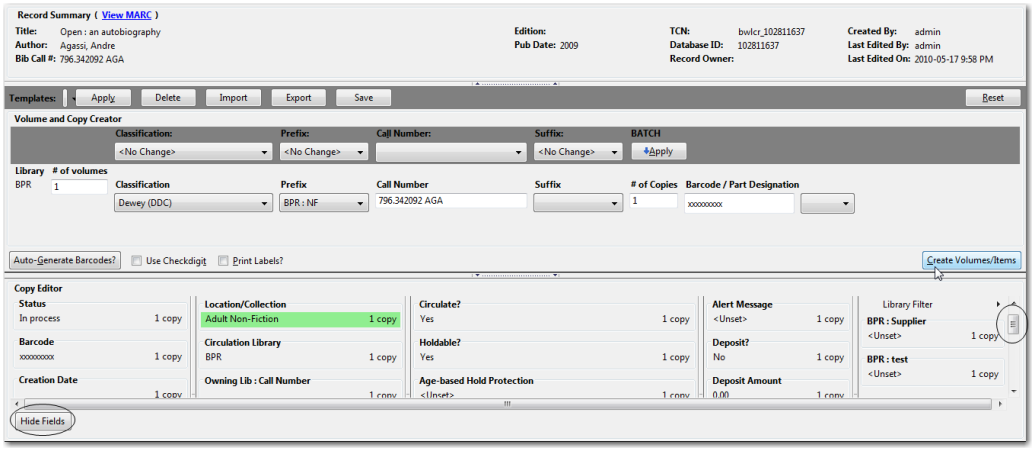
3. On *Holdings Maintenance*, select your library, or branch(es), from the list and click *Actions for Selected Rows* → *Add Volumes* or click on *Add Volumes* link at top left.



4. In the *Volume and Copy Creator* section of the screen:

   - Enter a number in the *# of volumes* field.
   - Type in a call number, or use the call number that is autofilled from the MARC record.
   - Use the drop down lists for prefix and suffix if your library uses that functionality.
   - Enter the appropriate number of copies and scan barcode(s).

   Use **Tab**, **Enter** or mouse to move through fields.



If you are creating place holders for on-order items see What is the best way to enter “on-order” records? in the Sitka Evergreen Policy and Best Practices Manual

5. Make all necessary edits to copy record in the *Copy Editor* section of the screen by moving through fields and clicking *Apply* on every edit.

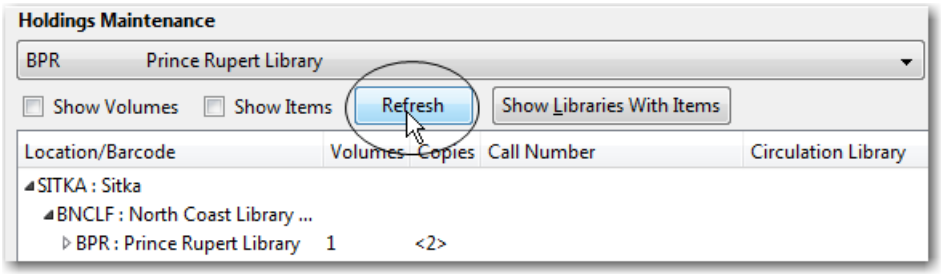
   For information on the individual fields in the *Copy Editor* see Section 15.1, “Copy Editor”

Co-op support recommends creating and using copy templates with the *Copy Editor*. For information on using and creating copy templates see the section called “Creating Copy Templates”

There is a field in the *Copy/Item Record* called *Floating?* Leave this field at its default blank, unless cataloguing special items using this field. If interested in using Floating to manage a rotating or block collection, contact Co-op support.

6. Click *Create Volumes/Items*.

7. You may need to click *Refresh* to view new items, and, depending on how you retrieved the volume/copy editor, you may be in the OPAC view.

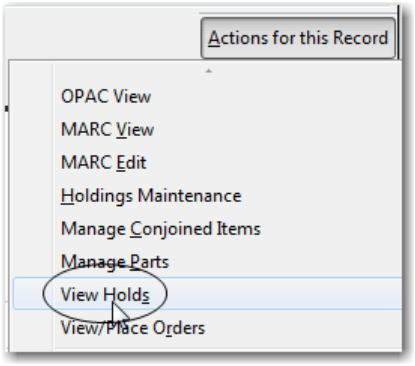


By default, a new item has a status of *In Process*. Item must be checked in to become *Available* or a cataloguer can choose to change the status to *Available* when creating the item record. Your library may choose to alter this behaviour by contacting Co-op support who can configure a desired default status for you.

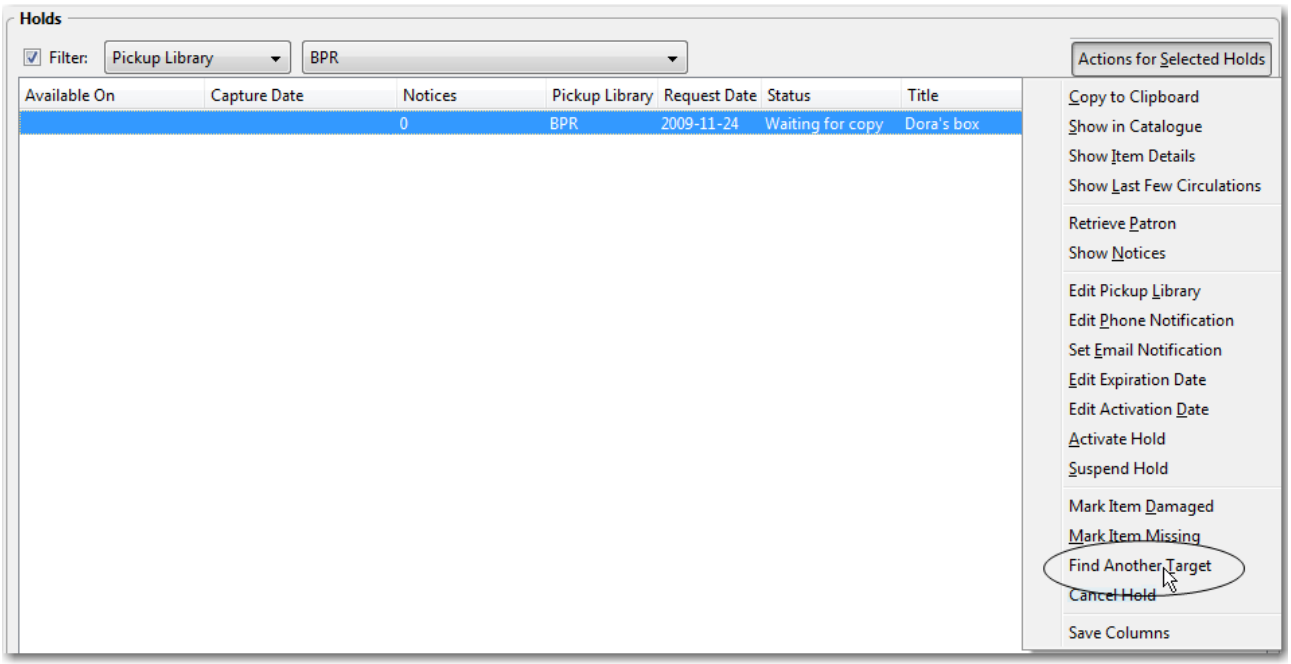
14.2. New Copies and Holds

Because of the way Evergreen targets holds, new copies are not guaranteed to fulfill pre-existing holds correctly until 24 hours after cataloguing. If your cataloguing turn-around time is shorter than 24 hours you can ensure the new copy is captured correctly at check in by using the checkin modifiers *Retarget Local Holds* and *Retarget All Statuses* or by following the steps below. Co-op support recommends single-branch libraries use the checkin modifiers, as once selected they are "sticky" and it is a simpler workflow than that described below. We recommend multi-branch libraries not use check-in modifiers to retarget holds, as the check-in modifier will only re-target the top local hold, which may not be the top system hold. For multi-branch libraries we recommend using the following procedure.

1. After adding the item select *Actions for this Record* → *View Holds*



2. If there are outstanding hold requests, select the hold that is next in line then choose *Actions for Selected Holds* → *Find Another Target*. This forces Evergreen to re-target the hold and recognize the newly catalogued item.



3. Check in the new item to capture it for the selected hold.

14.3. Adding holdings for non-physical resources

There are two ways to catalogue non-physical resources in Sitka Evergreen. Recommended process is to use specially coded MARC records as described in Section 18.5, “Cataloguing non-physical resources”. Alternatively you may add dummy holdings to a MARC record, using the same steps as adding physical holdings as described above. Adding dummy holdings will scope your non-physical resources to your catalogue. If you use dummy holdings it is important to use item barcodes from within your designated barcode range.

Chapter 15. Editing and Maintaining Holdings

15.1. Copy Editor

The *Copy Editor* is where you fill in the values for item attributes. You will use it to create or edit items. Below tables provide detailed description of the fields in an item record.

The *Copy Editor* will display during the process of cataloguing an item and can be accessed through *Holdings Maintenance* or from the *Item Status* screen by choosing *Edit Item Attributes* from the appropriate dropdown menu.

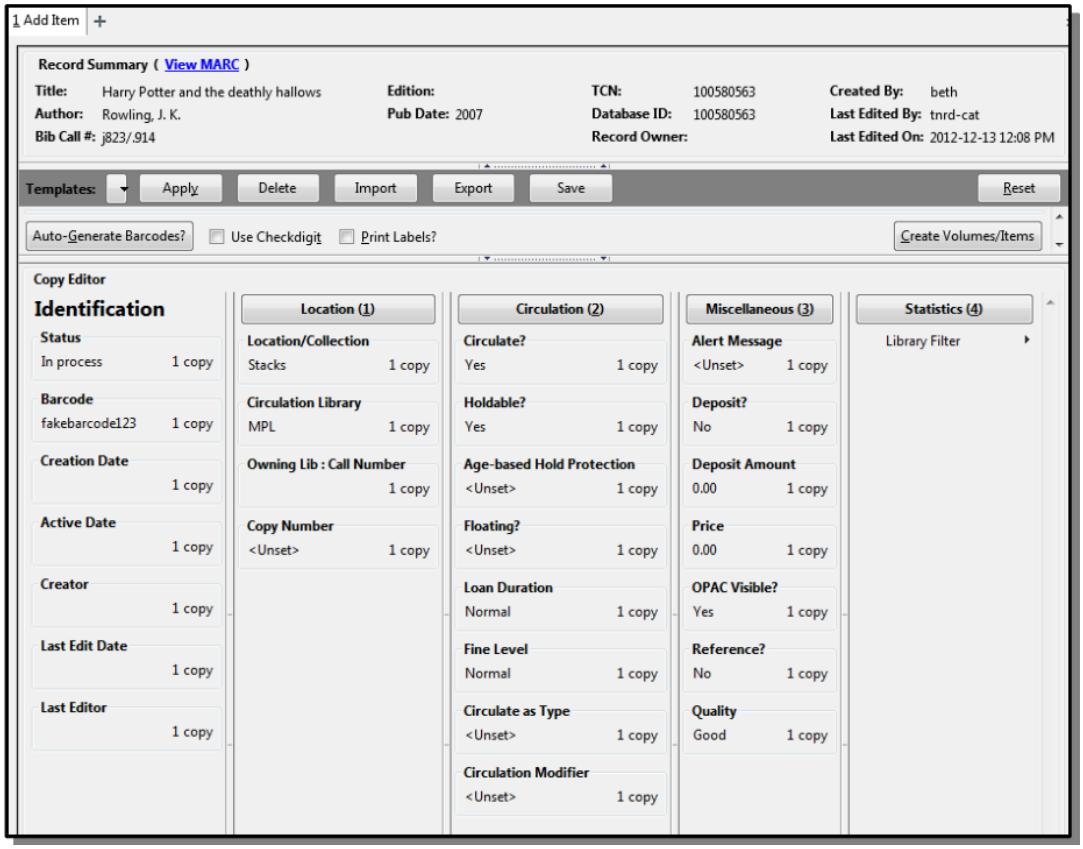


Table 15.1. Identification

Setting	Description	Notes
Status	Current status of the item	By default a new copy record is assigned a status of *In Process*. Item must be checked in to become *Available* or cataloguer can choose to change status to *Available* when a creating copy record. Some statuses, such as *Checked Out* and *On Holds Shelf*, are not editable. They

Setting	Description	Notes
		can only be used by circulation functions.
Barcode	Current barcode of the item	The barcode cannot be updated in the *Copy Editor*. See Section 15.5, “Replacing a barcode”
Creation Date	Date on which the item was created	This field will be automatically filled when the record is saved.
Active Date	Date on which the item goes into circulation	This field is empty if an item is created with status of *On Order* or *In Process*. It is filled when it is checked in or out, or its status is edited to others.
Creator	Username of the user who created the item	This field will be automatically filled when the record is saved.
Last Edit Date	Date on which the item was last edited	This field will be filled/updated when the record is saved.
Last Editor	Username of the last user to edit the item	This field will be filled/updated when the record is saved.

Table 15.2. Location

Setting	Description	Notes
Location/Collection	Shelving/Copy Location for the item	Shelving locations belonging to the circulating library/ branch and the organizations on a higher hierarchal level (library system, federation, or Sitka) are displayed in the dropdown list. Multi-branch libraries may create system level shelving locations for all branches to share.
Circulating Library	Library currently circulating the item.	
Owning Lib : Call Number	Owning library of Call Number and Call Number label	Call Number, aka Volume, is a separate record. Call Number cannot be updated in the *Copy Editor*. See Section 14.1, “Adding holdings to title records”
Copy Number	The copy number of the item	This is an optional field. Libraries may use it to identify duplicate copies under one title.

Table 15.3. Circulation

Setting	Description	Notes
Circulate?	Indicates whether the item can circulate or not	Leave it as "YES", unless the item is with a circulating collection (shelving location), but should not be circulated. If the shelving location's *Circulate?* attribute is "NO", this field will have no effect. But the "NO" value in this field will block circulating when the shelving location's *Circulate?* is "YES".
Holdable?	Indicates whether the item is holdable or not	Leave it as "YES", unless the item is with a holdable collection (shelving location), but holds should not be allowed on this particular item. If shelving location's *Holdable?* is "NO", this field will have no effect. But the "NO" value in this field will block holds when shelving location's *Holdable?* is "YES".
Age-based Hold Protection	Allows libraries to restrict holds to be picked up at a range of libraries	Sitka provides two sets of rules: x_month_within_single_branch and x_month_among_multi_branch. The former allows holds to be picked up at the item's circulating library only for x months, while the latter at libraries sharing the same parent with the circulating library, e.g. all branches of a library system or all single-branch libraries within a federation. In general, use the former if you are a single_branch library and want to restrict holds to your own library, or if you are a branch of a multi-branch library system and want to keep the holds at your own branch. Use the latter if you are a multi-branch library system and

Setting	Description	Notes
		allow items to fill holds picked up at all your branches, but not to go out of your system.
Floating?	This functionality must be configured by Sitka	If Sitka has not configured floating groups for you, leave the field blank.
Loan Duration	Indicates whether an item uses the *Short*, *Normal*, or *Long* loan duration attached to its circulation modifier or shelving location set up in the circulation policy.	Each circulation modifier/ shelving location may have three loan durations, corresponding to these three values. Use 'Normal' if only one loan period is used. Please contact Co-op support if you need multiple loan durations for one circulation modifier/ shelving location.
Fine Level	Indicates whether an item uses the *Low*, *Normal*, or *High* fine level attached to its circulation modifier or shelving location set up in the circulation policy.	Each circulation modifier/ shelving location may have three fine levels, corresponding to these three values. Use 'Normal' if only one fine level is used. Please contact Co-op support if you need multiple fine levels for one circulation modifier/shelving location.
Circulate as Type	Media type	When circulation policy is controlled by the media type in MARC records, this field can be used to override the MARC media type for individual items. It can also be used for statistics purpose.
Circulation Modifier	An identifier used for applying circulation policies and/or statistical purposes	A shared list of circulation modifiers displays in the dropdown list for all libraries. Each library selects circulation modifiers to use and for each selected circulation modifier the library may define its own circulation policy.

Table 15.4. Miscellaneous

Setting	Description	Notes
Alert Message	This message will show up when the item is retrieved or checked in or out	

Setting	Description	Notes
Deposit?	Indicates whether the checking out item requires a deposit or not	
Deposit Amount	Amount required as a deposit for the item	When the item is checked out a bill for this amount is automatically created in the patron account.
Price	Price of the item	The price entered is used when the system generates lost or damaged bills for the item.
OPAC Visible?	Indicates whether the item is visible in the OPAC or not.	Leave it as 'YES', unless the item is with an OPAC visible collection (shelving location), but should not be displayed on OPAC. If *OPAC Visible?* is "NO" for the shelving location, this field will have no effect. But the "NO" value in this field will hide the item, if *OPAC Visible?* is "YES" for the shelving location.
Reference?	Indicates whether the item is reference or not	This flag can be used for setting up circulation policies or statistics purpose.
Quality	Indicates the quality of the item	Quality is used to determine whether an item can be used to fill a hold. By default, only *Good* items will be used to fill holds. Co-op support strongly recommends leaving the quality of the item as *Good* for all items, unless you want to block holds on the item.

The *Statistics Column* is filled with the copy statistical categories created by your library or federation. For information on creating copy statistical categories see Section 48.15, “Statistical Categories Editor”

15.2. Editing holdings

In Evergreen, the call number is kept in a separate record, called volume or call number record. (These two terms are used interchangably in this document.) Call number can not be edited on *Copy Editor*. Items under the same title with the same call number share the same call number record. Copy records and volume records can be edited at several places.

1. You may edit items and call numbers on Item Status screen if you know the item's barcode. Go to *Search* → *Search for Copies by Barcode F5* OR *Circulation* → *Show Item Status by Barcode F5* OR *Cataloguing* → *Display Item F5*. Scan or type in the barcode. Once the item is displayed, highlight it.

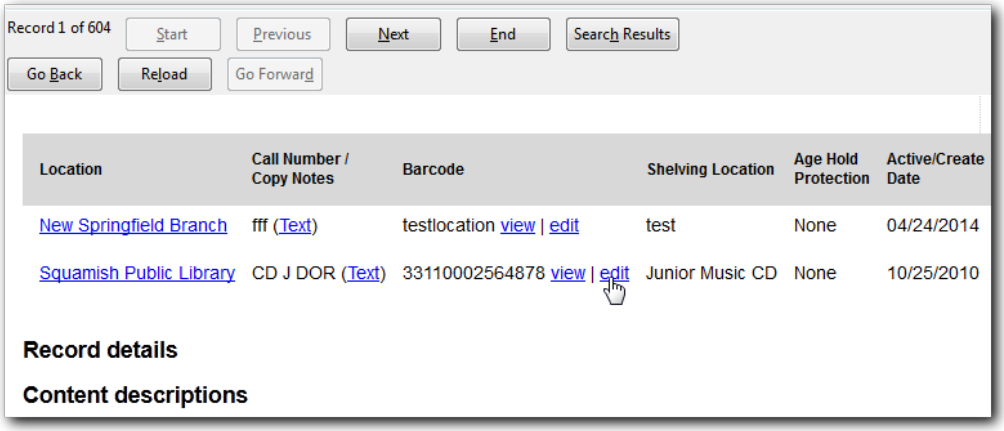
To edit the copy record, click *Actions for Cataloguers → Edit Item Attributes* . The item will be loaded into *Copy Editor*. Edit the fields that you want to and click *Apply* after each editing. Click *Modifiy Copy* when all editing is done.

To edit the call number, click *Actions for Cataloguers → Edit Volumes*. The call number is loaded in a popup window. Edit, then click *Modify* to save.

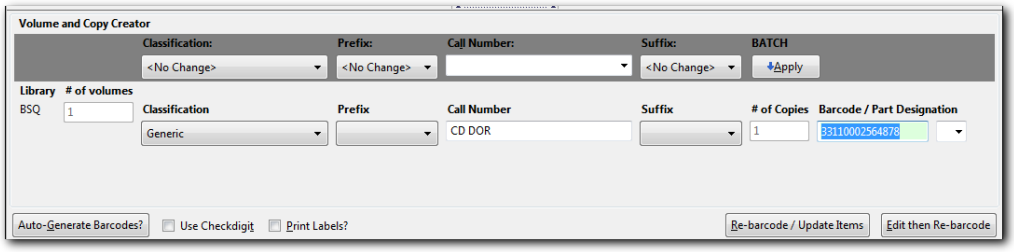
Evergreen does not allow two identical call numbers for one title, one library. You will be prompted if an existing identical call number is detected. You may select *Auto-Merge on Volume Collision* checkbox to avoid the prompt. The copies will be put under one call number.

Since copies and call numbers are separate records, their owning/circulating library may be different. Item's circulating library should match where it is usually located.

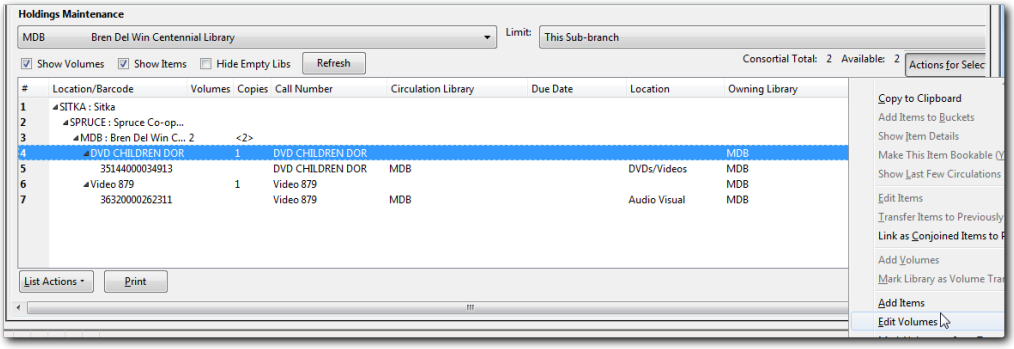
2. You may edit an item and/or its call number after finding it on the catalogue. Simply click *Edit* beside the barcode on the record details screen.



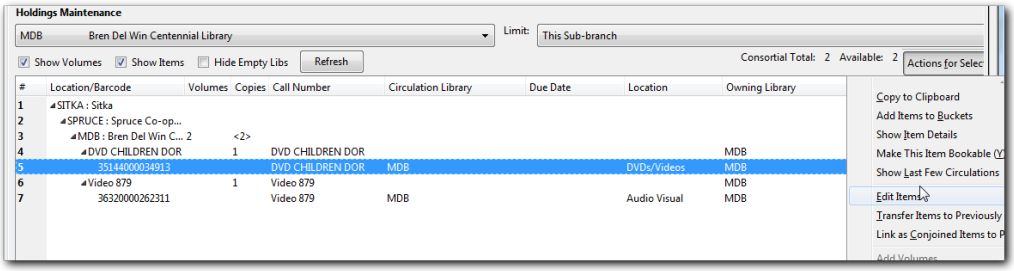
You may edit call number and barcode on this screen. If you do not wish to edit any item attribute, click *Re-barcode/Update Items*,otherwise click *Edit then Re-barcode* to load the item in *Copy Editor* for further editing.



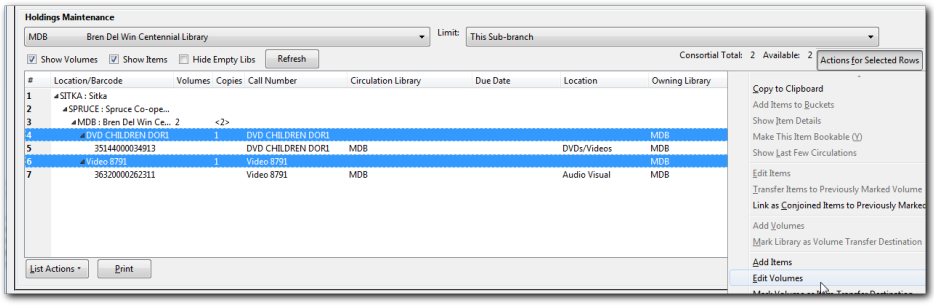
3. You may edit copy and call number records on *Holdings Maintenance* screen. To edit a call number, highlight the line with call number and click *Actions for Selected Rows → Edit Volumes*.



To edit the copy record, highlight the line with barcode and click *Actions for Selected Rows → Edit Items*.


Holdings Maintenance
MDB
Bren Del Win Centennial Library
Limit:
This Sub-branch
Show Volumes
Show Items
Hide Empty Libs
Refresh
Consortial Total: 2
Available: 2
Actions for Selec
Location/Barcode Volumes Copies Call Number Circulation Library Due Date Location Owning Library
1 SITKA : Sitka
2 SPRUCE : Spruce Co-op...
3 MDB : Bren Del Win C... 2 <2>
4 DVD CHILDREN DOR 1 DVD CHILDREN DOR MDB
5 35144000034913 DVD CHILDREN DOR MDB DVDs/Videos MDB
6 Video 879 1 Video 879 MDB
7 36320000262311 Video 879 MDB Audio Visual MDB
Copy to Clipboard
Add Items to Buckets
Show Item Details
Make This Item Bookable
Show Last Few Circulations
Edit Items
Transfer Items to Previously
Link as Conjoined Items to

You may edit multiple records of the same type displayed on the same screen at one time by highlighting all of them using **Ctrl** or **Shift** key and mouse click.



15.3. Copy Templates

Creating Copy Templates

Using Copy Templates

Exporting Copy Templates

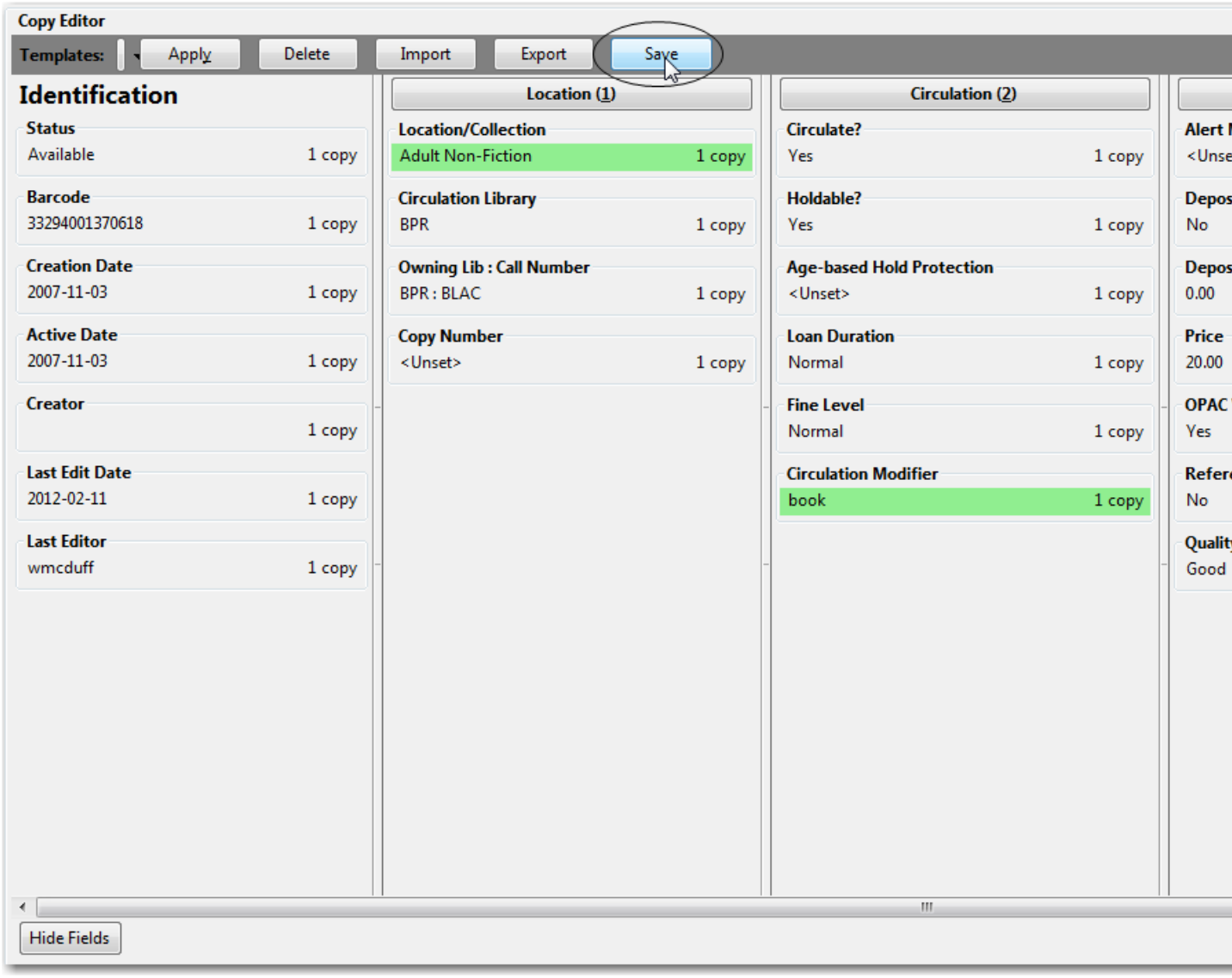
Importing Copy Templates

Copy templates allow you to set up default values for selected item attributes. For example, all adult fiction items use the same shelving location and circulation modifier. You may set up a copy template for adult fiction with the appropriate shelving location and circulation modifier values. When you apply this template, the two fields will be automatically filled with the default values. Use of templates enhances item creation and helps ensure consistency in records.

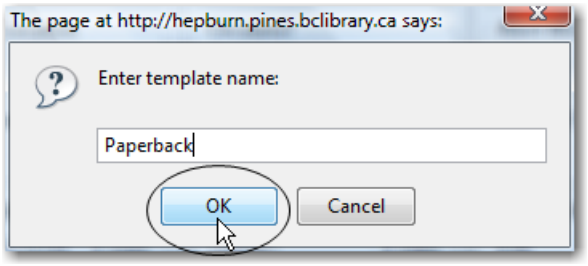
Creating Copy Templates

1. You can create a copy template directly under *Admin* → *Local Administration* → *Item Attribute Editor* OR you can create a copy template when editing an existing item record.

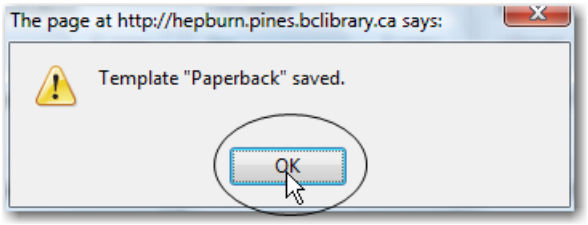
2. On Copy Editor, select/enter value for each required item attribute sharing the same default value and click *Apply* for every edit. Once done, click *Save*.



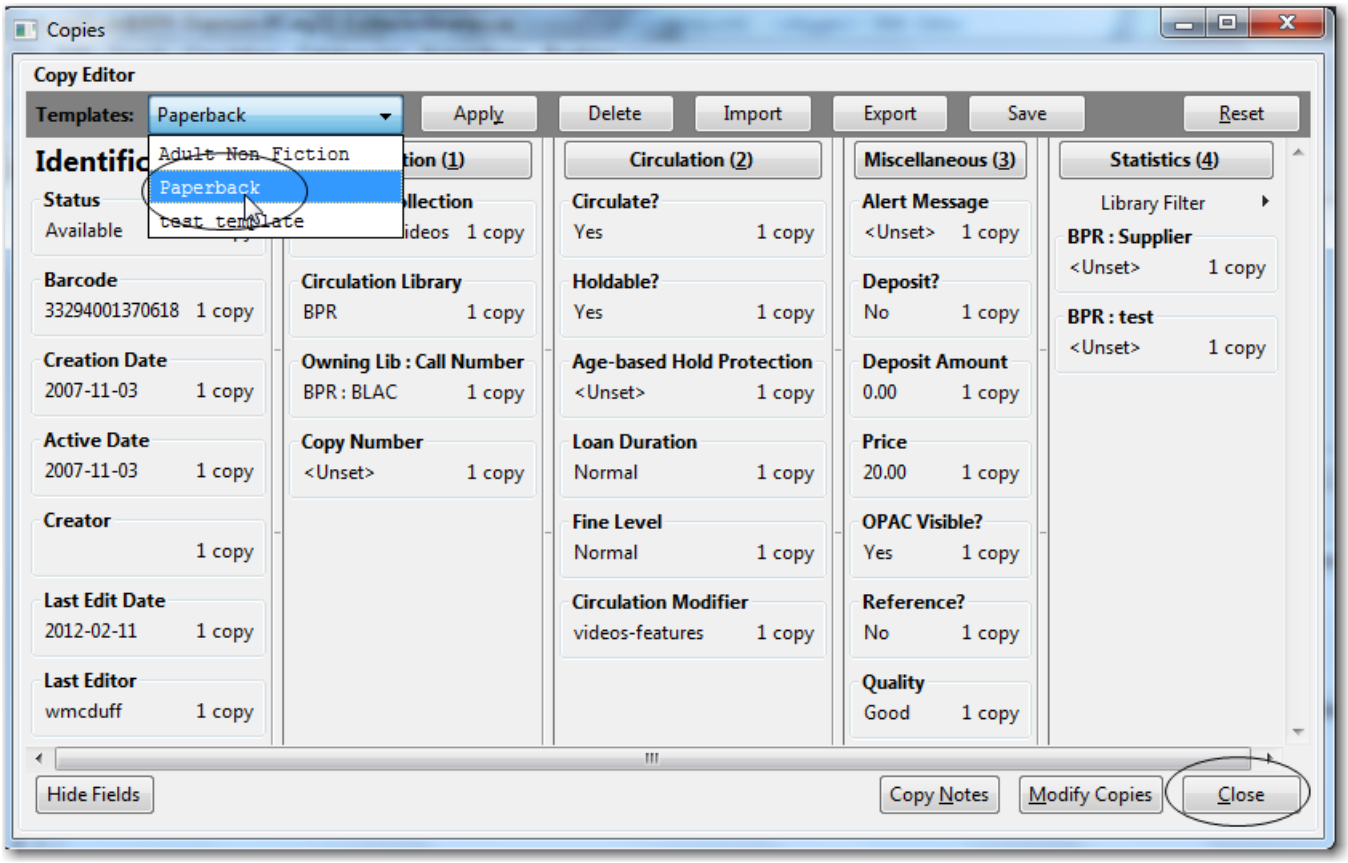
3. Enter a template name at prompt and click *OK*.



4. Template is saved. Click *OK*.



5. Back on Copy Editor, you can now see your new template from the dropdown menu. Click *Close* to exit the Copy Editor.



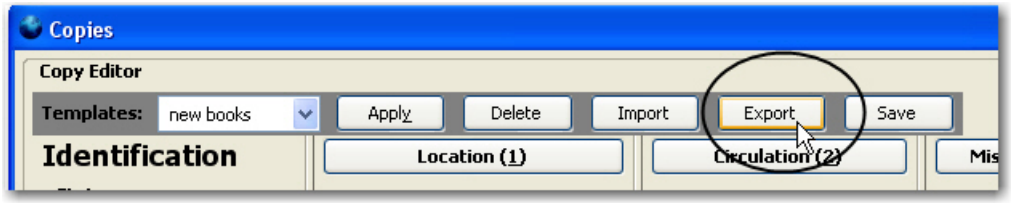
Using Copy Templates

To use a copy template when cataloguing/editing items, on Copy Editor, choose the template from the dropdown list as shown on the above screen and click *Apply* beside it. Those fields covered by the template will display with green coloured background.

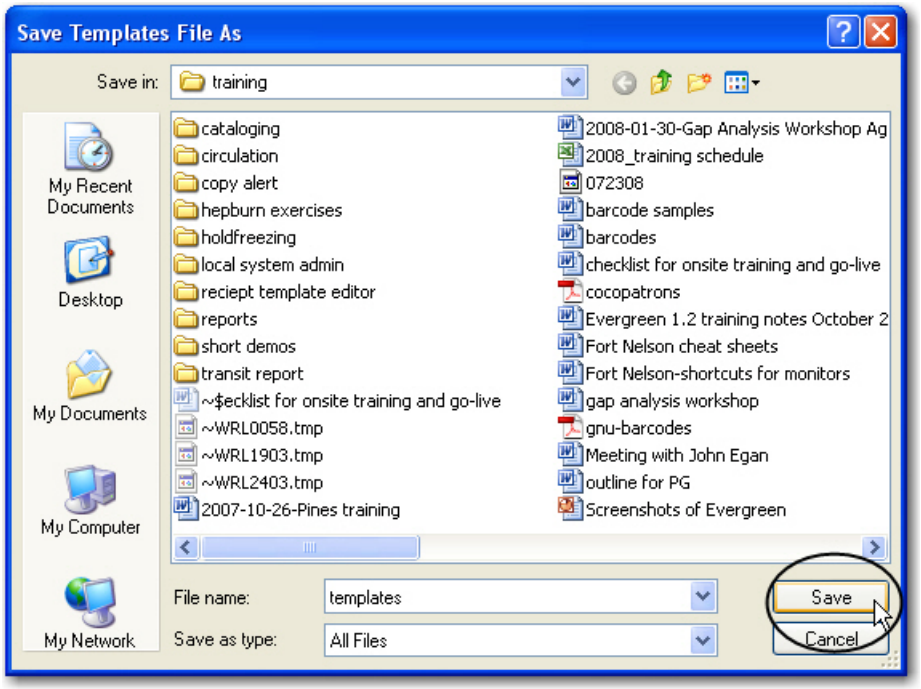
Exporting Copy Templates

Templates are saved on Evergreen server, but only viewable by the staff account that created them. To share templates with other staff, you will need to export them and the other staff to load them into their accounts.

1. To export copy templates, go to Copy Editor. Click on *Export* in the Template line on top of the screen. This will export all of your templates.



2. Select where you will save the template on your computer, name the file and click *Save*.

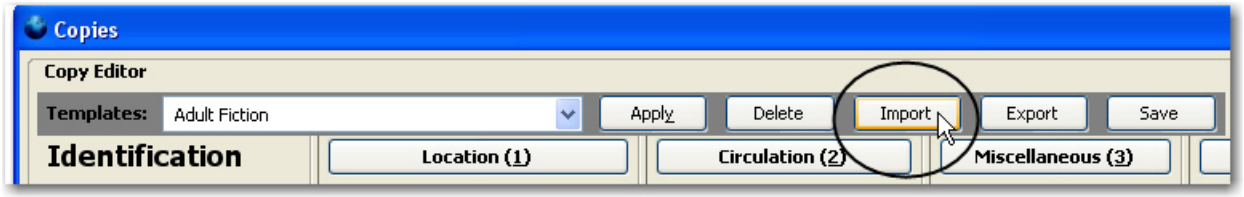


3. Click *OK* on the confirmation prompt.

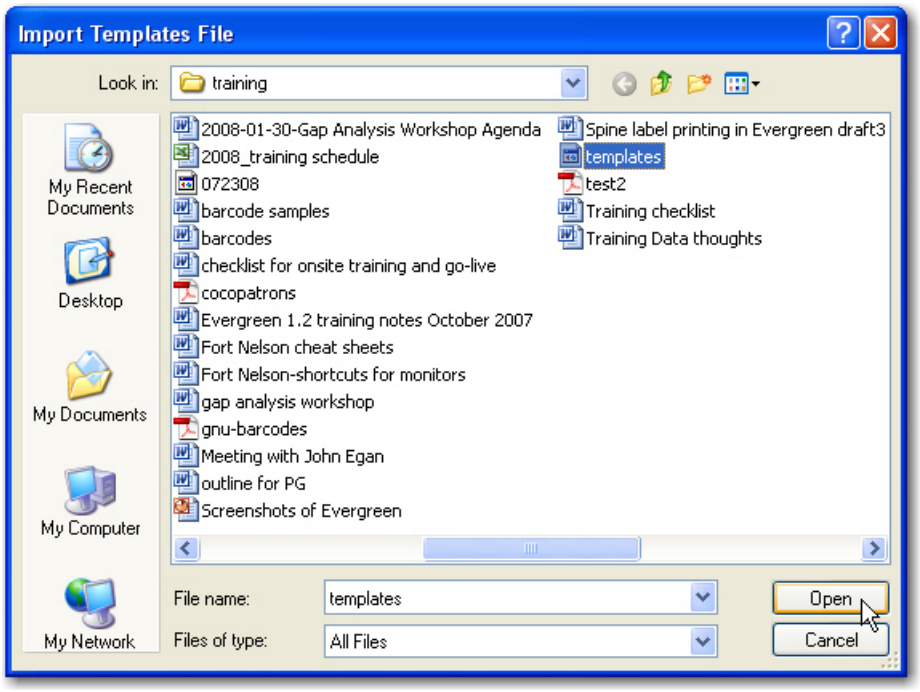
4. You could email the file to others, or save it to a flash drive and pass it to them, so that they can import the file to their Evergreen accounts. Alternatively, your colleagues may log into Evergreen with their accounts on your computer to import the templates.

Importing Copy Templates

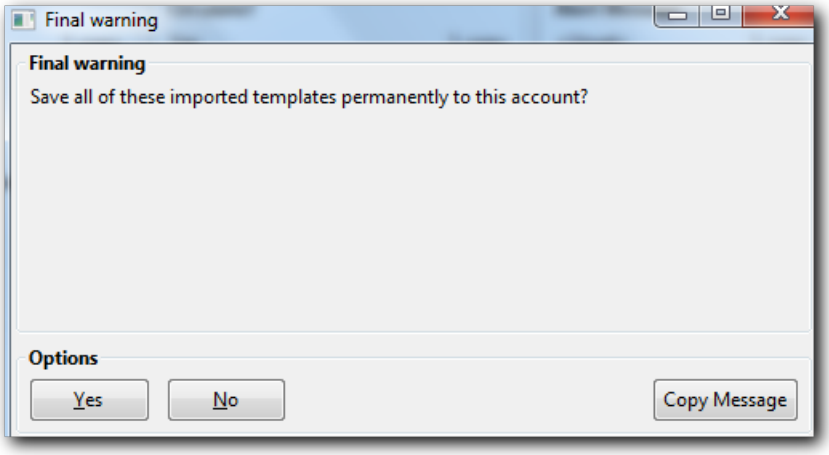
1. Load Copy Editor. Click on Import.



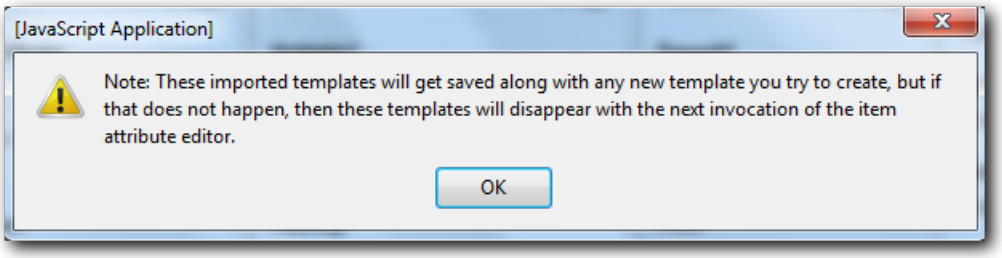
2. Navigate to where the template file is located, select it and click *Open*.



3. Choose "Yes" on the prompt to import the file.



If you choose "No", you will see the following prompt. The templates are not loaded, but may show up on the template dropdwn list. Re-load the Copy Editor. They will disappear.


[JavaScript Application]
Note: These imported templates will get saved along with any new template you try to create, but if that does not happen, then these templates will disappear with the next invocation of the item attribute editor.
OK

4. Click *OK* on the confirmation prompt.

When importing copy templates, existing templates will be kept, new ones will be added to them. If a duplicate template is detected, Evergreen will prompt you to choose whether to replace the existing one.

15.4. Batch Updating via Item Status screen

As discussed in the Circulation chapter, the Item Status (F5) screen is a very useful interface for all library staff. Cataloguers can perform multiple tasks from this screen. The example below demonstrates updating shelving location on multiple items. You can batch update any editable field in item records following this procedure. See Section 7.6, “Item Status (**F5**)” for more details.

1. Press **F5** on your keyboard or use the dropdown menu to access *Item Status* screen.
2. Scan all barcodes into *Barcode* field or use *Upload From File* if your barcodes are saved in a file.
3. Select the barcodes you wish to edit using the **Shift** or **Ctrl** on your keyboard.
4. Select *Actions for Cataloguers* → *Edit Item Attributes.*
5. The *Copy Editor* window opens. Note all the barcodes, different call numbers and shelving locations are displayed.
6. Select required shelving location and click *Apply*, just as if editing one record.
7. Click *Modify Copies* at bottom right of screen. This will modify all the shelving locations on your selected set of items.

15.5. Replacing a barcode

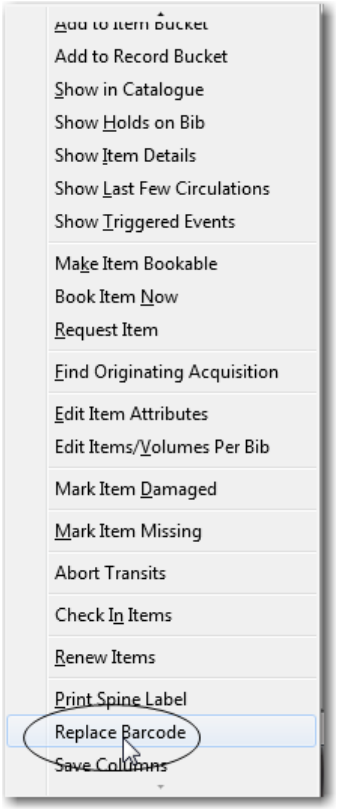
The simplest way to replace an item's barcode is to use *Replace Barcode* function on the *Circulation* or *Cataloguing* dropdown menu. You will be prompted to enter the old barcode and then the new barcode. *Replace Barcode* function is also available on Holdings Maintenance screen.

The *Edit* function (the link beside item's barcode) on Record Details screen on the catalogue allows you to update barcode, too.

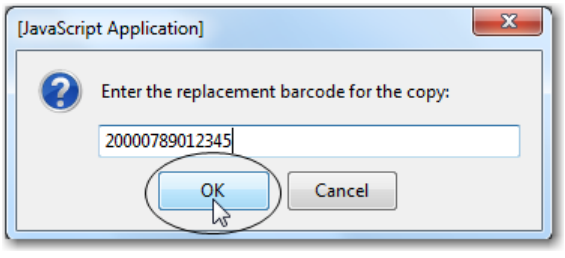
You may also replace a barcode on the *Item Status* (**F5**) screen.

1. Access the *Item Status* screen and scan or enter the existing barcode you wish to edit.

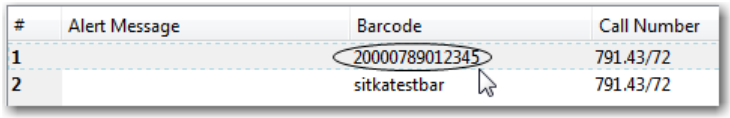
2. Highlight the item row and select *Actions for Cataloguers* or *Actions for Selected Items* and choose *Replace Barcode.*



3. Scan or enter new barcode and click *OK.*



4. Your item is displayed on *Item Status* screen with its new barcode, and the old barcode will no longer retrieve the item.



15.6. Spine Labels

Spine Labels - Single Label Roll

Spine Labels - Label Sheet

Spine Labels - Single Label Roll

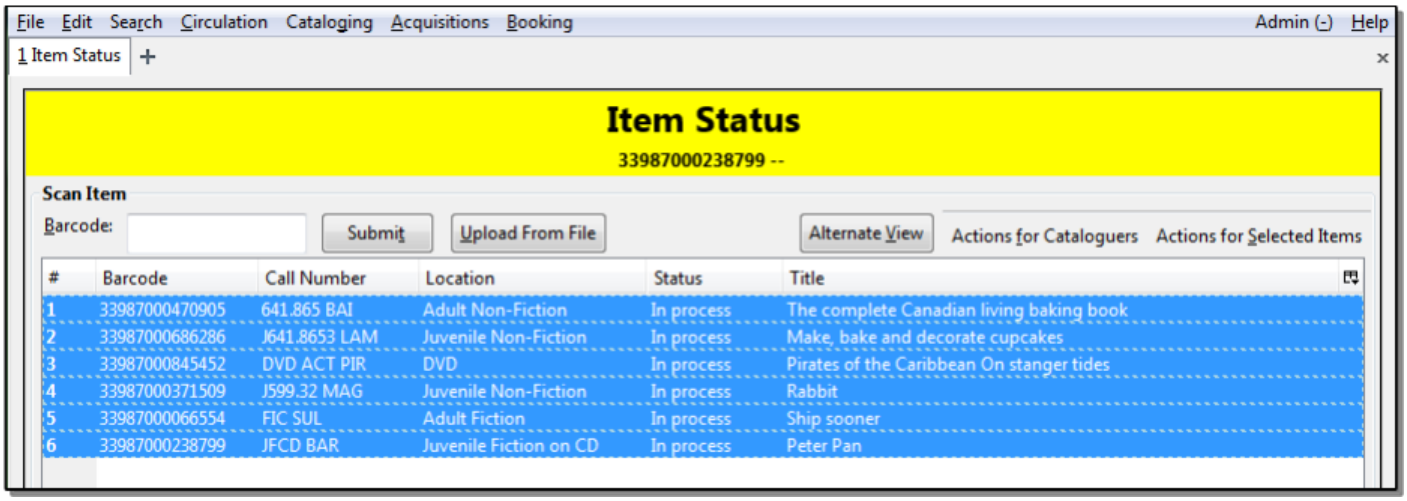
1. Open the *Item Status* interface.

   Circulation → Show Item Status By Barcode

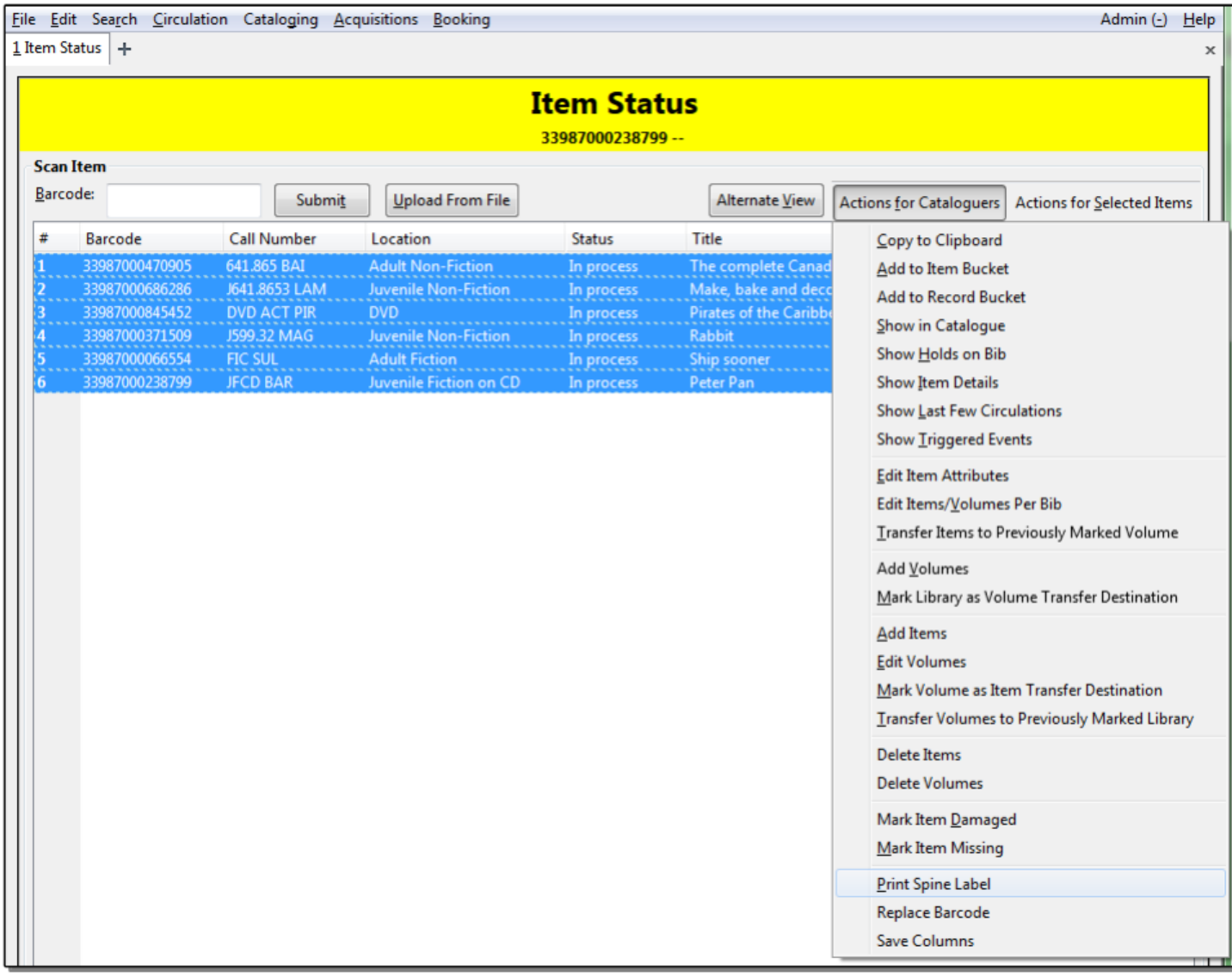
2. Scan the barcode(s) of all the items you would like to print spine labels for.

   Ensure the *Trim List (20 rows)* box is not checked or only 20 items will listed.

3. Highlight all the line items.

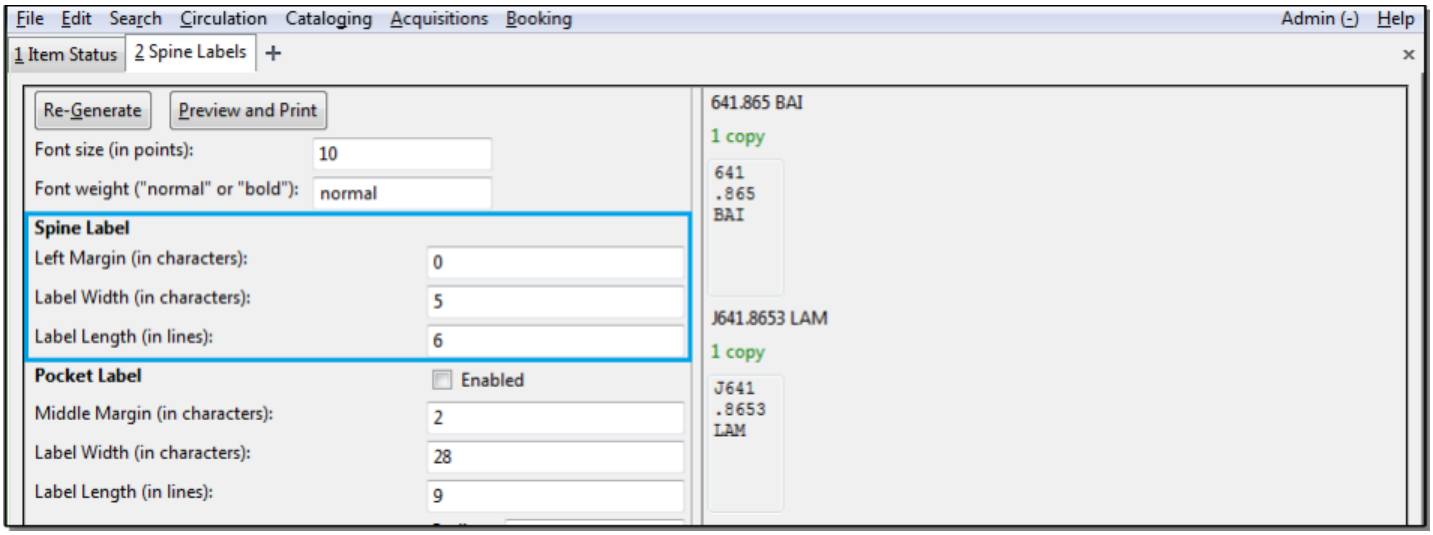

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help
1 Item Status
Item Status
33987000238799 --
Scan Item
Barcode:
Submit
Upload From File
Alternate View
Actions for Cataloguers
Actions for Selected Items
Barcode Call Number Location Status Title
1 33987000470905 641.865 BAI Adult Non-Fiction In process The complete Canadian living baking book
2 33987000686286 J641.8653 LAM Juvenile Non-Fiction In process Make, bake and decorate cupcakes
3 33987000845452 DVD ACT PIR DVD In process Pirates of the Caribbean On stanger tides
4 33987000371509 J599.32 MAG Juvenile Non-Fiction In process Rabbit
5 33987000066554 FIC SUL Adult Fiction In process Ship sooner
6 33987000238799 JFCD BAR Juvenile Fiction on CD In process Peter Pan

4. Click *Actions for Cataloguers* or *Actions for Selected Items* and choose *Print Spine Label.*


File Edit Search Circulation Cataloging Acquisitions Booking
Admin (-) Help
1 Item Status
Item Status
33987000238799 --
Scan Item
Barcode:
Submit
Upload From File
Alternate View
Actions for Cataloguers
Actions for Selected Items
Barcode Call Number Location Status Title
1 33987000470905 641.865 BAI Adult Non-Fiction In process The complete Canad
2 33987000686286 J641.8653 LAM Juvenile Non-Fiction In process Make, bake and decc
3 33987000845452 DVD ACT PIR DVD In process Pirates of the Caribb
4 33987000371509 J599.32 MAG Juvenile Non-Fiction In process Rabbit
5 33987000066554 FIC SUL Adult Fiction In process Ship sooner
6 33987000238799 JFCD BAR Juvenile Fiction on CD In process Peter Pan
Copy to Clipboard
Add to Item Bucket
Add to Record Bucket
Show in Catalogue
Show Holds on Bib
Show Item Details
Show Last Few Circulations
Show Triggered Events
Edit Item Attributes
Edit Items/Volumes Per Bib
Transfer Items to Previously Marked Volume
Add Volumes
Mark Library as Volume Transfer Destination
Add Items
Edit Volumes
Mark Volume as Item Transfer Destination
Transfer Volumes to Previously Marked Library
Delete Items
Delete Volumes
Mark Item Damaged
Mark Item Missing
Print Spine Label
Replace Barcode
Save Columns

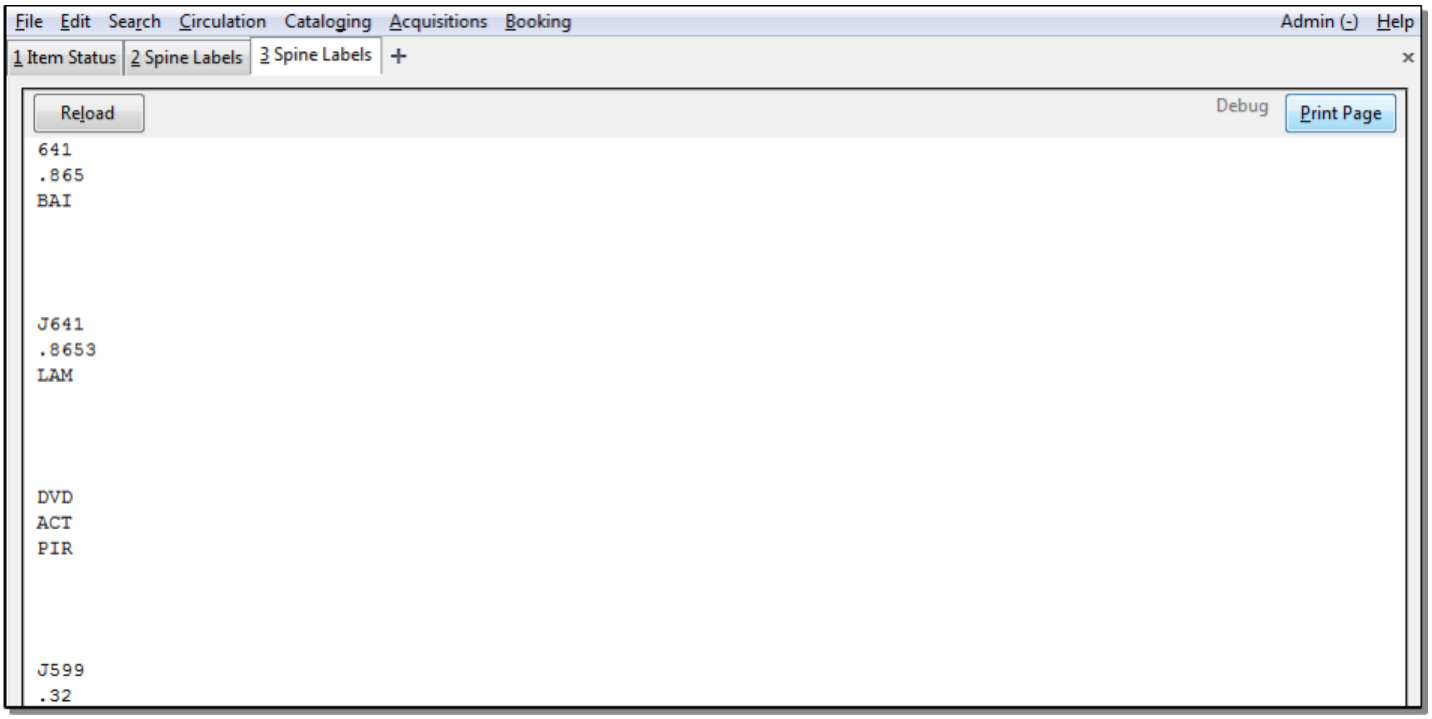
5. Use the *Spine Label* settings to adjust the label to match your physical label's dimensions. Click *Re-Generate* to see your changes.

These fields are sticky by workstation so the values you set should appear by default.



6. Click *Preview and Print*.

7. Click *Print Page*.



8. Depending on your printer settings the spine labels will automatically print to your spine label print or you will get a pop up asking you to select a printer.

Spine Labels - Label Sheet

A short video on printing spine labels can be found here.

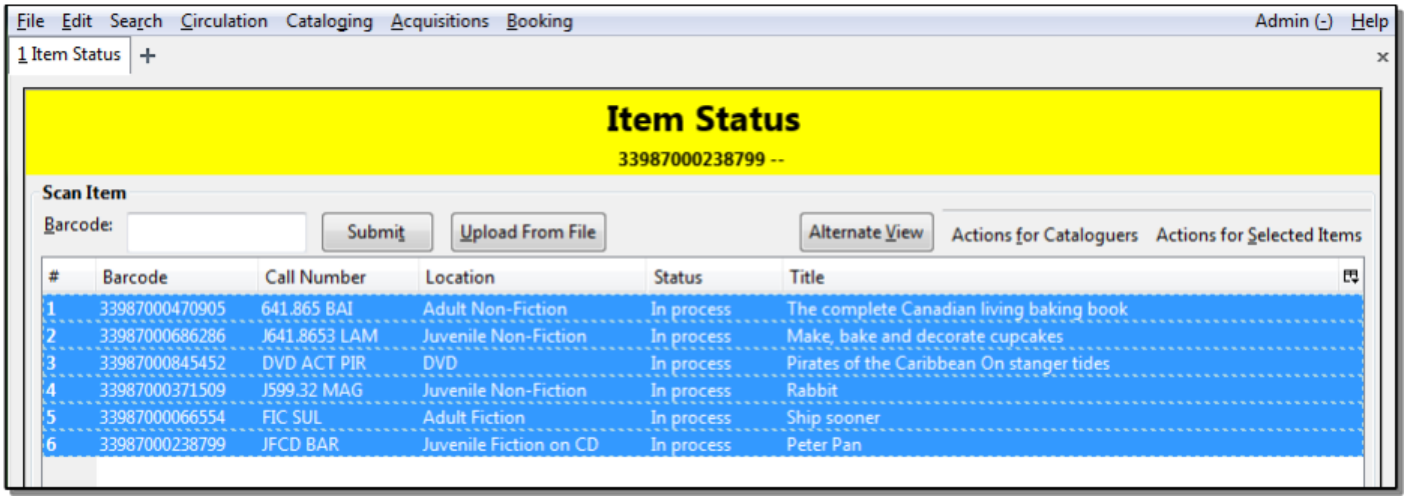
1. Open the *Item Status* interface.

   Circulation → Show Item Status By Barcode

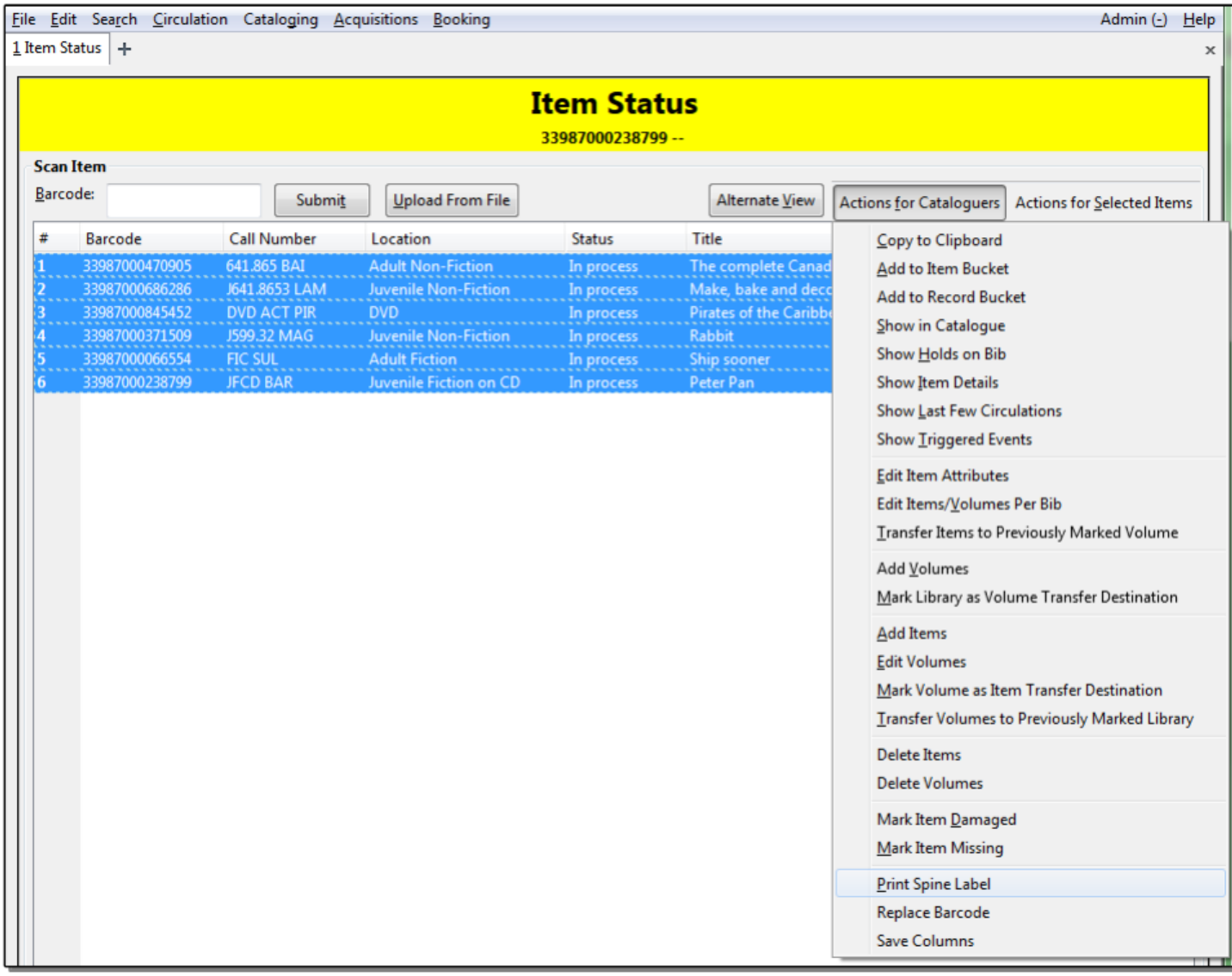
2. Scan the barcode(s) of all the items you would like to print spine labels for.

   Ensure the *Trim List (20 rows)* box is not checked or only 20 items will listed.

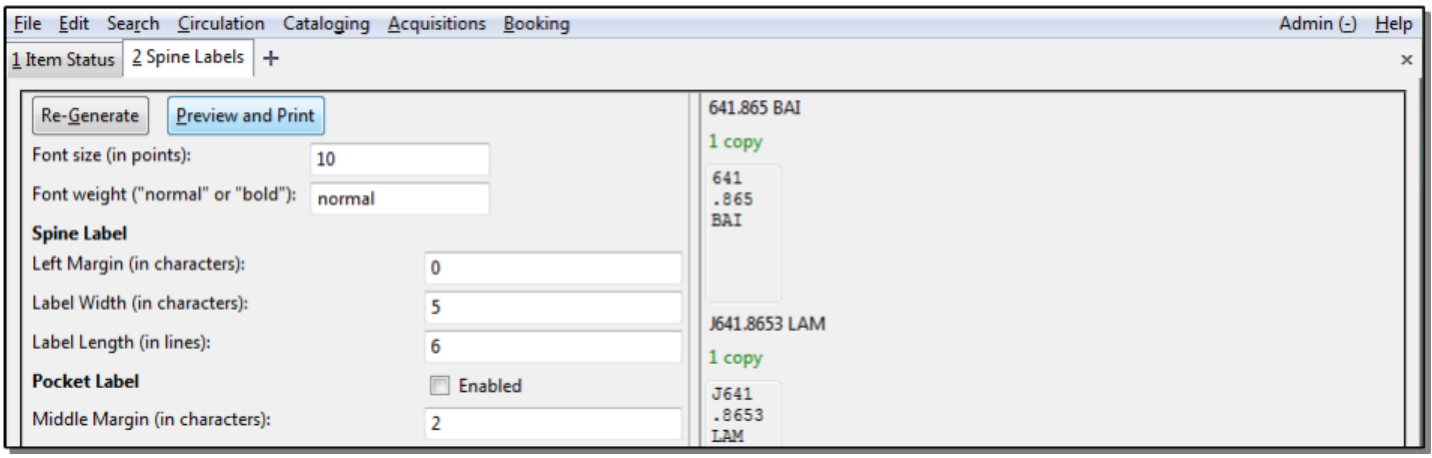
3. Highlight all the line items.


File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help
1 Item Status
Item Status
33987000238799 --
Scan Item
Barcode:
Submit
Upload From File
Alternate View
Actions for Cataloguers
Actions for Selected Items
Barcode Call Number Location Status Title
1 33987000470905 641.865 BAI Adult Non-Fiction In process The complete Canadian living baking book
2 33987000686286 J641.8653 LAM Juvenile Non-Fiction In process Make, bake and decorate cupcakes
3 33987000845452 DVD ACT PIR DVD In process Pirates of the Caribbean On stanger tides
4 33987000371509 J599.32 MAG Juvenile Non-Fiction In process Rabbit
5 33987000066554 FIC SUL Adult Fiction In process Ship sooner
6 33987000238799 JFCD BAR Juvenile Fiction on CD In process Peter Pan

4. Click *Actions for Cataloguers* or *Actions for Selected Items* and choose *Print Spine Label.*


File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help
1 Item Status
Item Status
33987000238799 --
Scan Item
Barcode:
Submit
Upload From File
Alternate View
Actions for Cataloguers
Actions for Selected Items
Barcode Call Number Location Status Title
1 33987000470905 641.865 BAI Adult Non-Fiction In process The complete Canad
2 33987000686286 J641.8653 LAM Juvenile Non-Fiction In process Make, bake and decc
3 33987000845452 DVD ACT PIR DVD In process Pirates of the Caribb
4 33987000371509 J599.32 MAG Juvenile Non-Fiction In process Rabbit
5 33987000066554 FIC SUL Adult Fiction In process Ship sooner
6 33987000238799 JFCD BAR Juvenile Fiction on CD In process Peter Pan
Copy to Clipboard
Add to Item Bucket
Add to Record Bucket
Show in Catalogue
Show Holds on Bib
Show Item Details
Show Last Few Circulations
Show Triggered Events
Edit Item Attributes
Edit Items/Volumes Per Bib
Transfer Items to Previously Marked Volume
Add Volumes
Mark Library as Volume Transfer Destination
Add Items
Edit Volumes
Mark Volume as Item Transfer Destination
Transfer Volumes to Previously Marked Library
Delete Items
Delete Volumes
Mark Item Damaged
Mark Item Missing
Print Spine Label
Replace Barcode
Save Columns

5. Click *Preview and Print*.

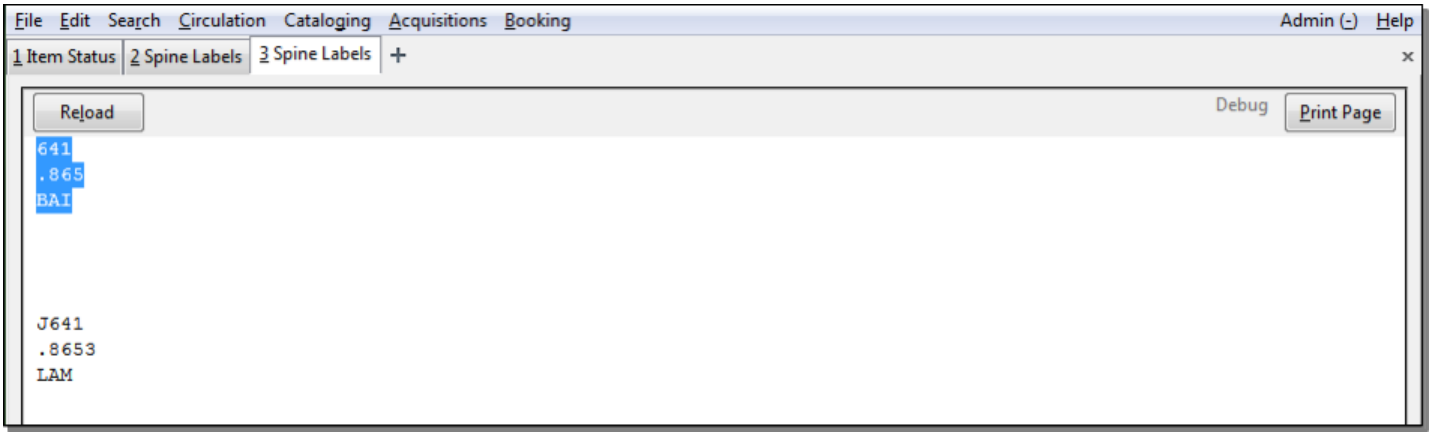


6. Open your spine label template in a work processor.

   Contact Co-op Support if you require assistance setting up a template.

7. Click inside the document so the cursor appears in the middle of the first "box".

8. In Evergreen highlight the first label and copy (**Ctrl**+**C**) the text.



9. Paste (**Ctrl**+**P**) the label into the template.

10. Repeat steps 8 and 9 until all the labels appear in the template.

11. Adjust the formatting, fonts, etc. of the labels as desired.

12. Print the page on your label stock.

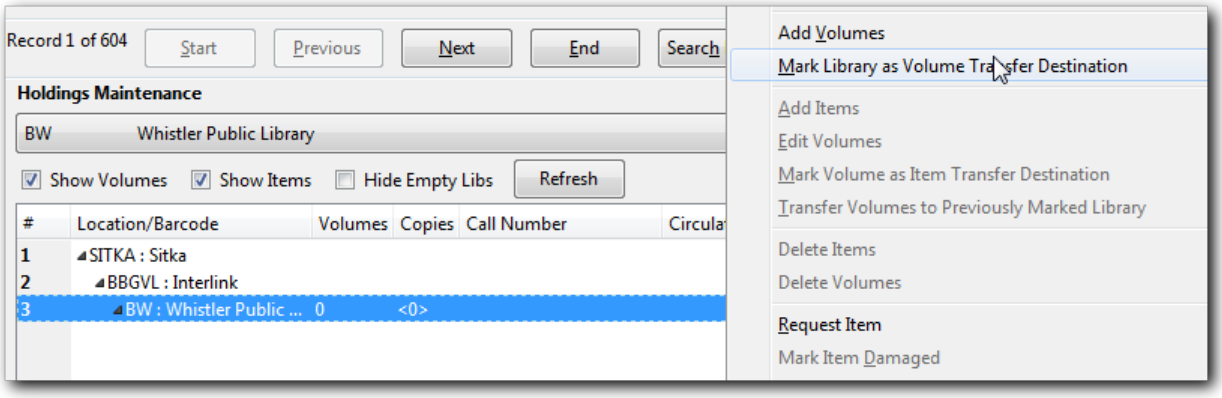
15.7. Transferring holdings

There are times when you need to move copy records from one title record to another, or move copies from one volume to another under the same or another title record. This lesson will demonstrate the steps required to achieve a transfer. The critical step is to ensure that you first mark the destination record. In some cases you may also need to first create a volume record. Co-op support recommends you read through the process first before starting, as each scenario has different characteristics.

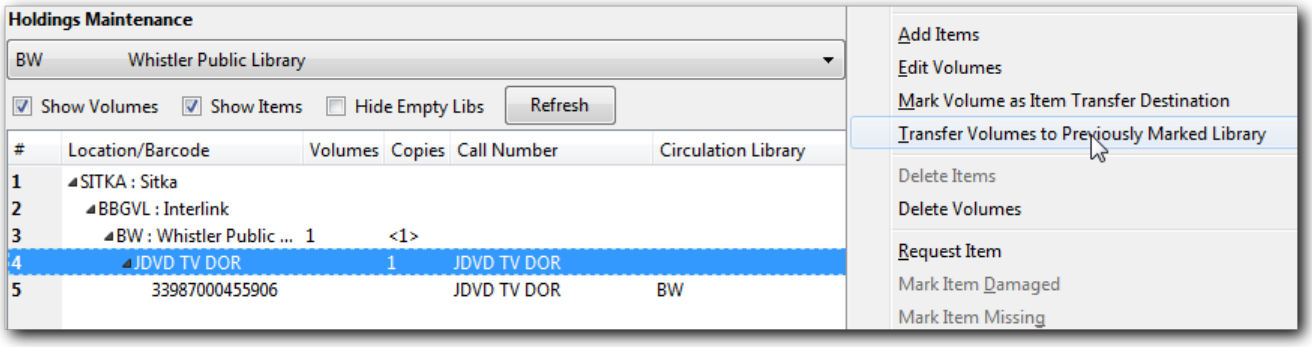
Transferring volumes

When you want to transfer all items under one call number/volume to another title or another branch under the same title, you may use Transfer Volume. Evergreen will transfer both call number and all copies under it to the new title or branch.

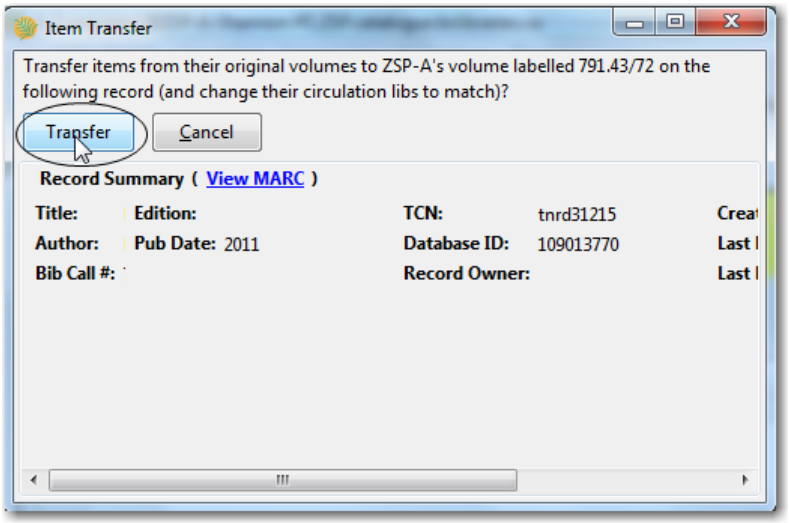
1. Find the destination or target record and go to *Holdings Maintenance*. Highlight your library or branch, right click and select *Mark Library as Volume Transfer Destination.* Or you may click *Actions for Selected Rows → Mark Library as Volume Transfer Destination*.



2. Find the volume record you need to transfer on *Holdings Maintenance*. Highlight it, right click and select *Transfer Volumes to Previously Marked Library.*



3. Confirm the transfer and click *Transfer*.



4. Refresh the screen to see the change, if not automatically done.

To do the transfer step, you may also find the item(s) on *Item Status* (**F5**) screeen. Click *Actions for Catalogurs → Transfer Volumes to Previously Marked Library*. Both call number and copies will be transferred to the previously marked destination. You may transfer mulitple records at one time by highlighting all of them.

If the destination title/branch has a volume with the same call number label, the copies will be merged into that volume.

Holds under the title, volume or copy will not be transferred with the holdings. They need to be manually transferred to the destination record.

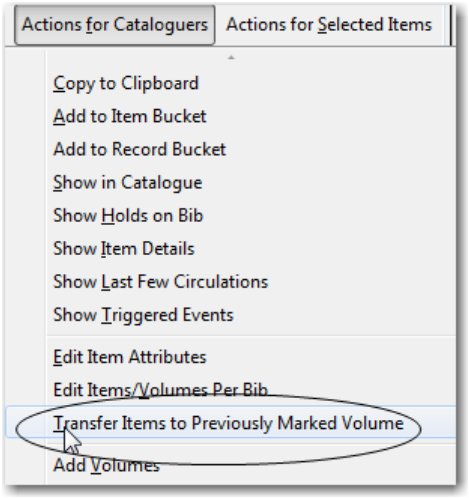
Transferring copies

Sometimes you may need to transfer copy records only from one volume to another, e.g. transferring a copy from reference collection to circulating collection using a different call number, or transferring one copy from one branch to another that already has a voume and copy.

1. To transfer a copy record to another volume, find your target record in the catalogue, and go to *Holdings Maintenance* screen.

2. Find your target volume on the record and right-click on it and select *Mark Volume as Item Transfer Destination*. Or you may select *Actions for Selected Rows → Mark Volume as Item Transfer Destination*.

3. Go to the catalogue and find the record containing the copy you wish to transfer and go to *Holdings Maintenance*. Highlight the record you wish to transfer. Select *Actions for Selected Rows → Transfer Items to Previously Marked Volume.* Alternatively, you may do this transfer step by scanning the item barcode into *Item Status* (**F5**)screen and making the same choice from *Actions for Cataloguers* menu. The screenshot below is from Item Status screen.



4. Confirm the transfer details and click *Transfer*.

You may transfer multiple copies to a previously marked volume on the *Item Status* (**F5**) screen by scanning all copies into the screen, selecting all to highlight, then choosing *Actions for Cataloguers → Transfer Items to Previously Marked Volume.*

Transferring copies to a title without a call number/volume yet

Sometimes you may need to transfer copies only to a title/branch that does not yet have a volume record or you wish to use a different call number label. For example, you want to transfer one of the two copies from one branch to another that does not have a copy. In this scenario you will need to first create a zero copy volume record (a volume record without any copy record under it) on the destination library/branch.

1. Find the destination record in the catalogue and go to *Holdings Maintenance.* Highlight the library/branch and right click to select *Add Volumes* or select *Actions for Selected Rows → Add Volumes*

2. Add your call number without a barcode, then click either *Create with Defaults* or *Create then Edit* to create the volume record.

3. Back on Holdings Maintenance screen, highlight this volume record and *Mark as Item Transfer Destination* as described above.

4. Find the copy record to be transferred either via *Holdings Maintenance* or *Item Status* screen as above described, and select *Transfer Item to Previously Marked Volume.*

Depending on your workflow, you can use the transfer function to transfer **Pre-Cat** records to MARC records. You may need to first create a volume record on the destination title record, or at minimum mark a volume as *Item Transfer Destination*, then go to *Item Status* (**F5**) screen to transfer your **Pre-Cat** item to the destination record.

You may edit the Circulating Library field on Copy Editor to move a copy to another branch. But the call number's owning library will remain unchanged. On Holdings Maintenance screen, the item will be displayed under the call number's owning library.

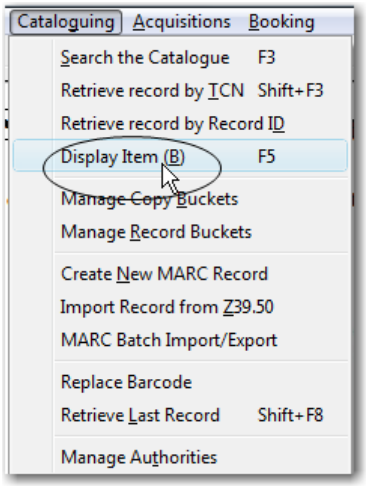
15.8. Deleting holdings

When adding items to the catalogue, you need to have a bibliographic record first, then you create a volume and copy record. When you delete holdings you need to follow the reverse order. You need to delete copy records first. By design and Sitka's configuration, Evergreen will also attempt to delete the volume and bibliographic record. These records will be deleted if they are not used by other copies/volumes. If you delete your library's last copy, the volume record will be deleted together with the copy. If this is also the last copy for the title (no other libraries have a copy), the bibliographic record will be deleted, too. So for most cases, you just need to delete the copy records only. If possible, Evergreen will delete the volume and bibligraphic records automatically. Occasionally you may want to delete an "orphan" volume (without any copy) or bibliographic (without any volume) record.

Deleting copy records

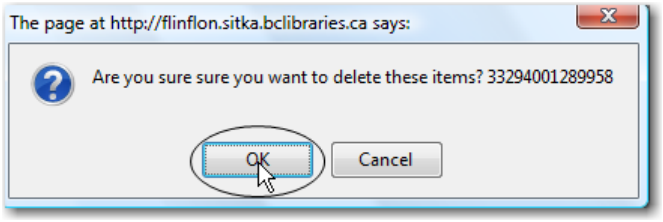
If you have the item in hand, the quickest way to delete an item is to scan the item into Item Status screen, accessible a couple of ways.

1. Select *Search* → *Search for copies by Barcode*, or select *Cataloguing* → *Display Item (B)*, as shown here. Alternatively, press **F5** on your keyboard.

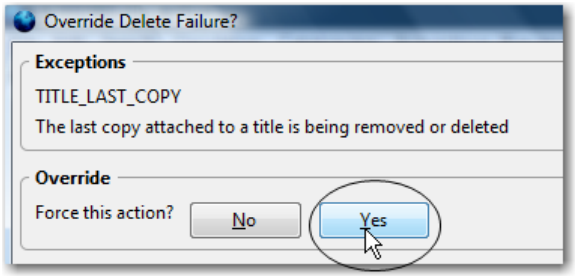


2. Select the item (s) and choose *Actions for Cataloguers* → *Delete Items*.

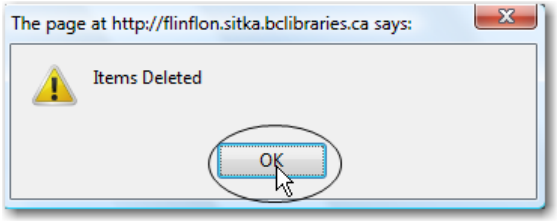
3. Click *OK*.


The page at http://flinflon.sitka.bclibraries.ca says:
Are you sure sure you want to delete these items? 33294001289958
OK
Cancel

4. In this example the alert for last copy is configured. Make appropriate choice based on workflow.



5. Click *OK*. Item, volume and MARC record are all deleted in this example, because there was only one copy and volume record attached to this MARC record.

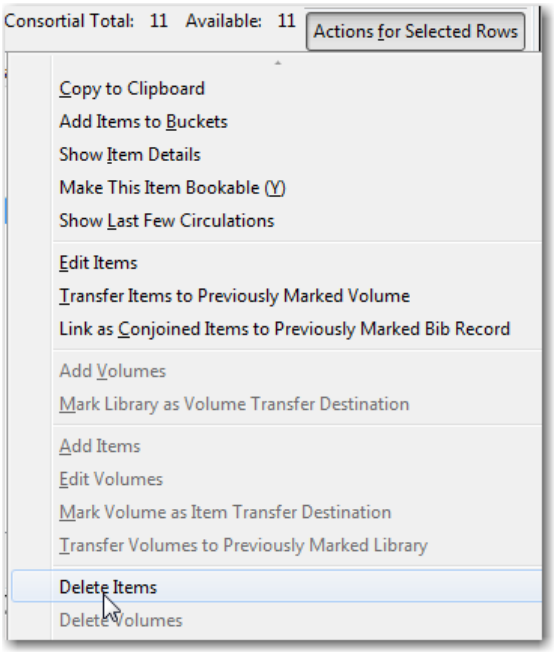


You may also delete copy records from the Holdings Maintenance view.

1. Find the title on the catalogue and display it on record details screen by clicking the title link on the result list.

2. Select *Actions for this Record → Holdings Maintenance*

3. Click on your item barcode row and select *Actions for Selected Rows → Delete Items*. Note that in this example there are 11 consortial items attached to this MARC record.


Consortial Total: 11 Available: 11
Actions for Selected Rows
Copy to Clipboard
Add Items to Buckets
Show Item Details
Make This Item Bookable (Y)
Show Last Few Circulations
Edit Items
Transfer Items to Previously Marked Volume
Link as Conjoined Items to Previously Marked Bib Record
Add Volumes
Mark Library as Volume Transfer Destination
Add Items
Edit Volumes
Mark Volume as Item Transfer Destination
Transfer Volumes to Previously Marked Library
Delete Items
Delete Volumes

4. Confirm deletion at prompt by clicking *Delete*. Item is deleted. In this case your library's volume record is also deleted, as Sitka Evergreen has been configured to do. This Sitka wide setting helps keep the consortial database free of orphaned volume records. The MARC record, with other consortial holdings, is left intact.

If the item being deleted is the sole copy on this MARC record, the volume and MARC record will be automatically deleted as explained above. If you have Evergreen configured to alert on last copy, Alert on empty bib records, the alert would be presented. The alert and the effect of deleting the sole copy on a MARC record are not affected by how you delete the last copy.

You may also delete copy records by utilizing buckets. The advantage to this method is that you can keep a record of items deleted by not emptying or deleting the bucket. Please see Section 17.2, "Working with Copies in a bucket" for more information.

It is Sitka best practice to review status and owning library of items to be deleted. Co-op support recommends you do this by configuring the column picker, see Column picker, to display status field and owning library field. If an item is not in an ideal state for deleting, for example checked out, you should not delete the item until that status is resolved. Mis-scans can result in another library's item presented on your screen. Confirming owning library is correct will prevent errors. Careful review of your screen for duplicate scans is also recommended.

Transferring your last copy on a bibliographic record to another volume record on a different bibliographic record will also automatically delete your original volume record, due to the Sitka wide configuration mentioned above. If your volume and copy were the last holdings attached to the original bibliographic record, the bibliographic record is also deleted upon item transferring.

Delete a volume record without copies attached

Occasionally you may want to delete a volume record without copies attached to it. For example, you may have created a volume record, but did not add a copy to it. To delete it, you need to find the title. Go to Holdings Maintenance. Highlight the "orphan" volume record, select *Actions for Selected Rows → Delete Volumes*. If this is the last volume, the bibliographic record will be deleted, too.

Delete a bibliographic record without volume/copy attached

You may have created/imported a MARC record, but did not use it for your copy. In such a scenario you may delete the record. Find the title on the catalogue, select *Actions for This Record → Delete Record*. The record will be deleted.

If you do not see any copies under the record, but are prompted that the record can not be deleted, very likely there are "orphan" volume records still under the title. You need to go to Holdings Maintenance to locate and delete the volume records. The MARC record will be deleted when you delete the last volume.

Deleted MARC records can be retrieved and undeleted if you know the record's database id. Go to the dropdown menu *Cataloguing → Retrieve Title via Database ID*. Type in the record id. Once the record is displayed (with red coloured background), select *Actions for This Record → Undelete Record* to undelete it.

Co-op support regularly cleans up volume records without copies and bibliographic records without copies or volumes.

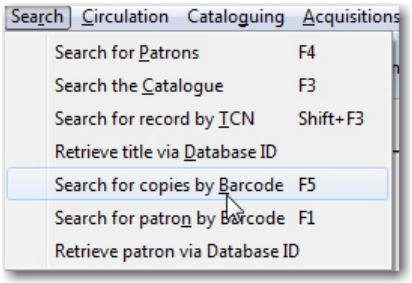
Chapter 16. Copy Alerts

This lesson explains when you might use a copy alert, how to create one and how to remove one. It also illustrates what copy alerts look like in the Item Status screen, at checkin, and checkout.

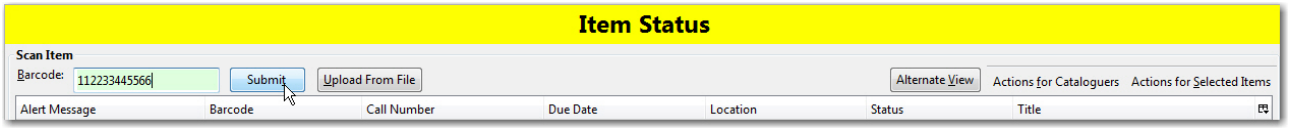
Copy alerts are a useful type of alert for a physical copy of an item. For example, you might create a copy alert when one piece of a four-part kit is missing. You might use a copy alert when you are checking out an item to a patron and notice that the spine label needs to be replaced. You might create a copy alert when you notice that an item has been damaged. When the item is checked in or out, the alert will pop up on the screen.

Creating copy alerts

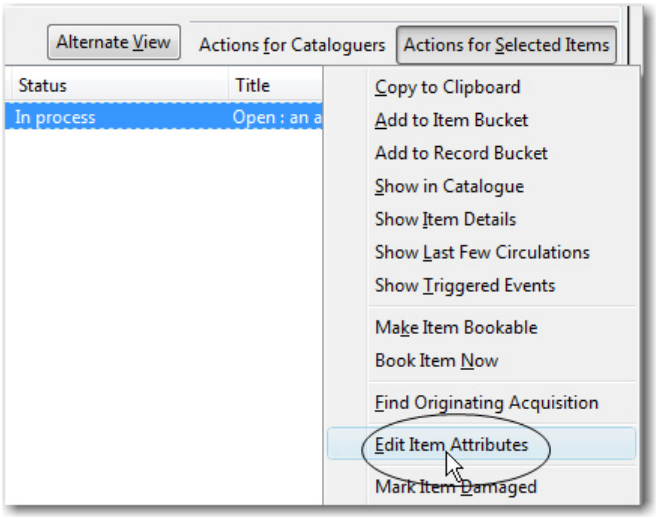
1. Select *Search* → *for copies by Barcode*, or use the keyboard shortcut **F5**.



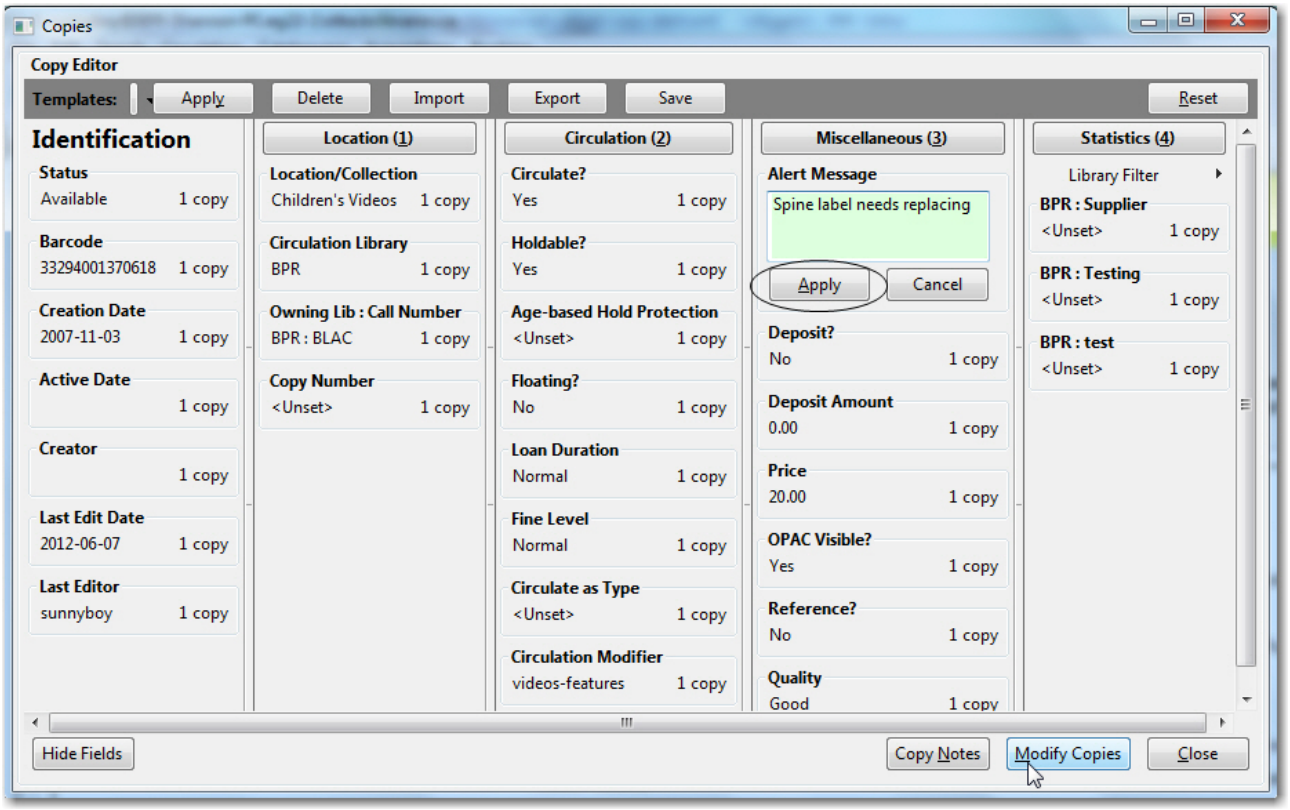
2. Scan in the item barcode.



3. Select the row, and under *Actions for Selected Items*, select *Edit Item Attributes*.



4. The item will be loaded into Copy Editor. Add an *Alert Message*, click *Apply* and *Modify Copies*.

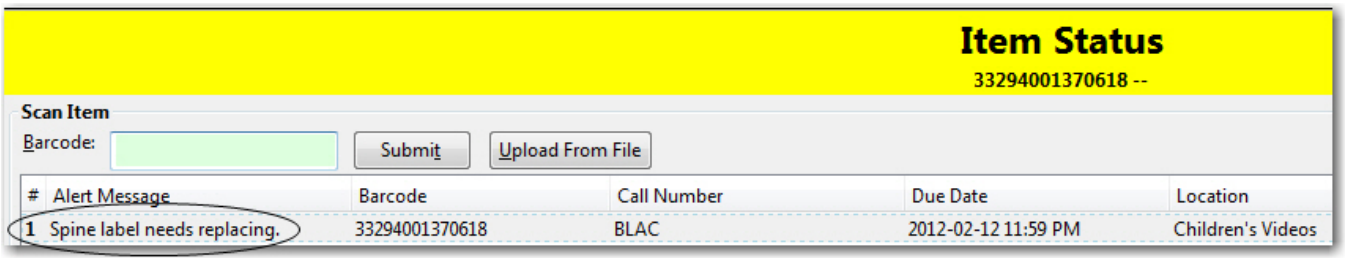


Copy alerts must be manually removed. Follow the same process to remove a copy alert.

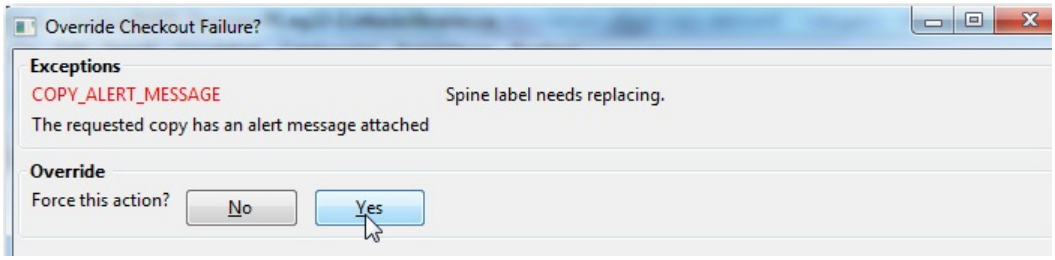
It is possible to add or remove copy alerts to multiple items by scanning them into the *Item Status* screen. At Step 3, instead of selecting one item, you can select all of the items you wish to change by highlighting the first item in the list, holding down the **Shift** key and clicking on the last item. To select several, non-sequential items, hold down the **Ctrl** key and click on the items you wish to select.

What copy alerts look like

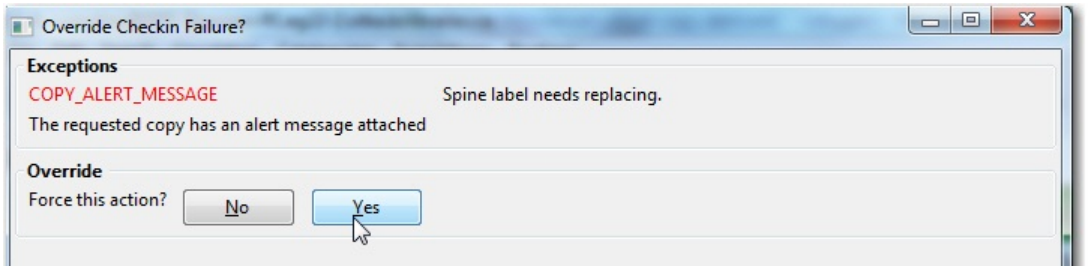
If you scan this item in the *Item Status* screen, you will see the copy alert.



When this item is checked out, the copy alert will look like this:



When this item is checked in, the copy alert will look like this:



Chapter 17. Copy Buckets

Buckets is the name for a batch change functionality in Evergreen, or for a function that groups records in one place. Batch changes allow you to group together many records and enact changes on them all at once, instead of individually editing them. Buckets can also be used to create pull lists. Buckets allow you to track and work with your materials in arbitrary ways and more easily collaborate with others.

This chapter will demonstrate a variety of ways in which you can manage your records with Buckets.

Currently there are copy and title record buckets. You may work on copy records with *Copy Buckets* and MARC records with *Record Buckets*.

Some possible uses for buckets are batch editing items, deleting items, and grouping like items temporarily to change their status or to create bibliographies and pull lists. While you can batch edit records a variety of ways in Evergreen, using common Windows functions such as select all and edit, buckets are useful for keeping records together over a period of time. For example, if you scan 20 items into the Item Status screen you can batch edit or delete from there by selecting all, but you have to enact those changes right then while records are all together on the screen. By utilizing Evergreen's bucket functionality, you can create a bucket and add records to that bucket, and they stay there until you are ready to work with them, whether that be immediately or days later. Adding items to a bucket is like creating and saving a query. The record being in a bucket does not affect normal library functions such as circulation, as being in a bucket is not a status.

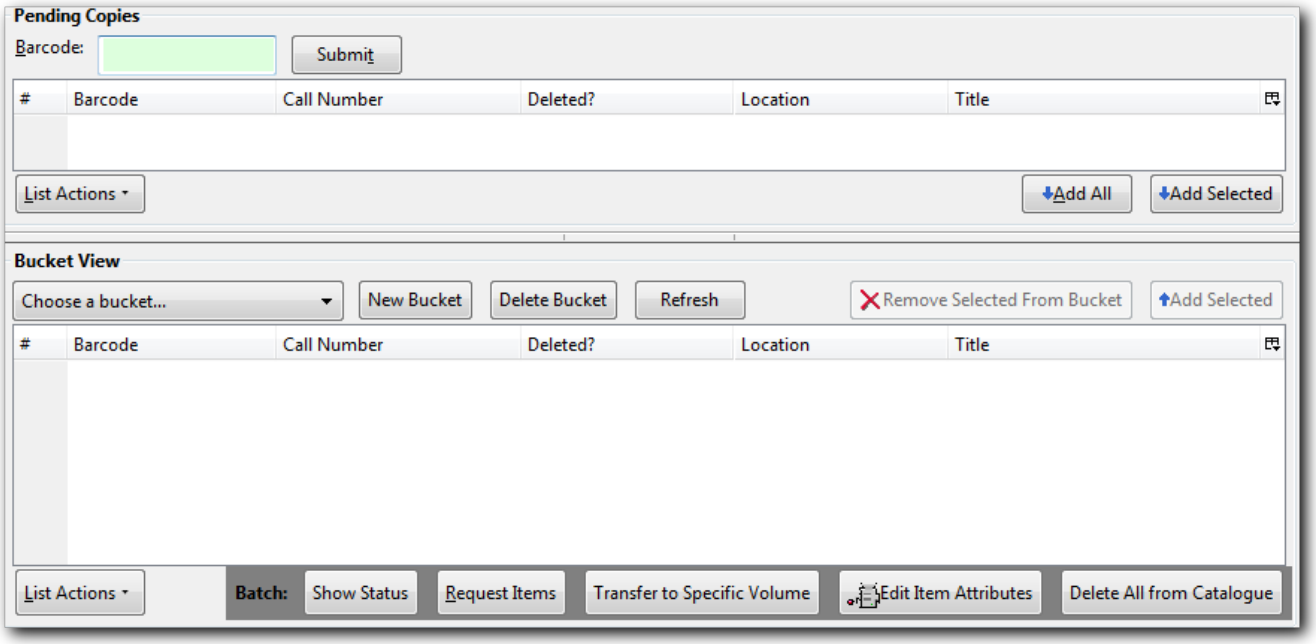
Buckets can be shared or private, and are associated with a login.

Deleted records are not automatically removed from buckets. It is recommended that you always display *Deleted?* field in *Bucket View*.

When a bucket is retrieved, all information about the records in it is transferred to the workstation. It consumes the computer's resources. It is recommended that a copy bucket contain no more than a few hundred records.

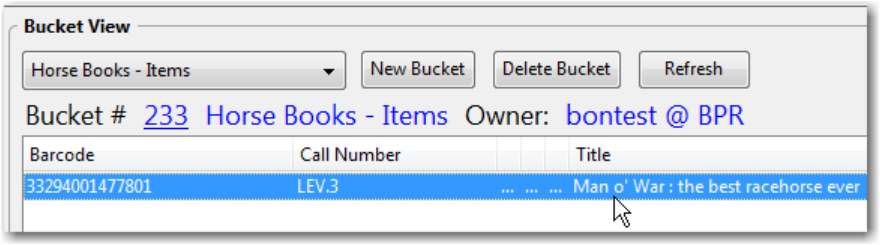
17.1. Adding Copy Records to Copy Buckets

You may create a copy bucket by going to the dropdown menu *Edit* → *Copy Buckets*. Click *New Bucket*. You may also create a new bucket when attempting to add an item to a bucket.



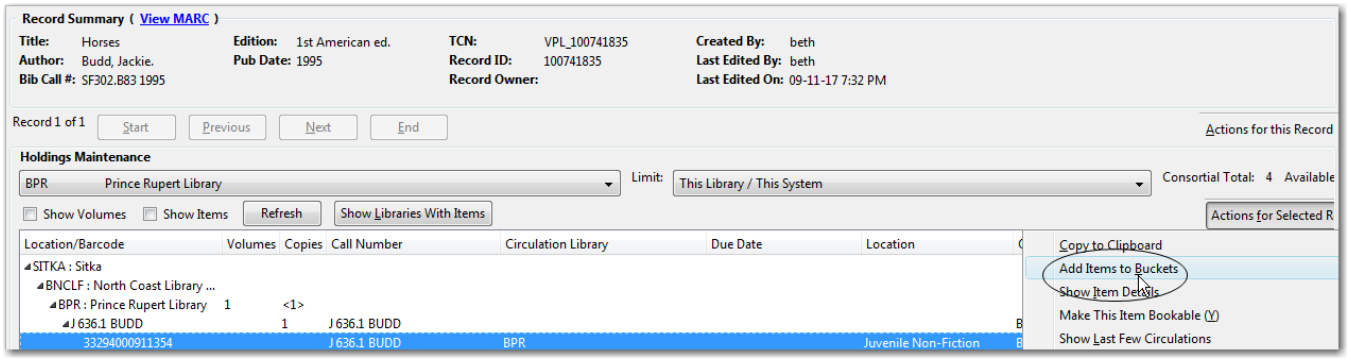
To add items to a bucket, select or create a bucket in the *Bucket View* first. Scan item barcodes into the box in the *Pending Copies* pane shown on the above screen. Select *Add All* or *Add Select* to move pending items to the selected bucket in the lower pane. Use **Ctrl** or **Shift** with mouse clicking to select multiple items.

Copy record is now in the selected bucket.

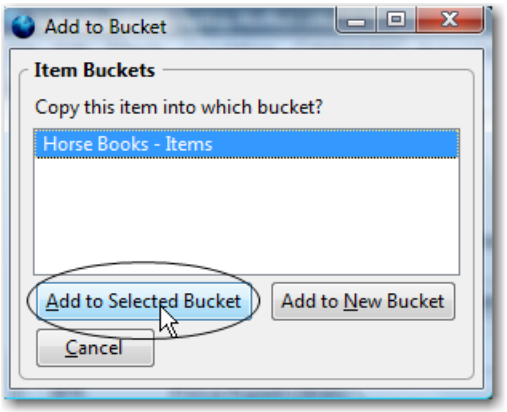

Bucket View
Horse Books - Items
New Bucket
Delete Bucket
Refresh
Bucket # 233 Horse Books - Items Owner: bontest @ BPR
Barcode Call Number Title
33294001477801 LEV.3 Man o' War : the best racehorse ever

You may also add copy records to a bucket when they are displayed on some other screens, such as *Holdings Maintenance*, *Item Status*, *Check In* and *Items Out* in patron accounts. *Add Items to Buckets* is included in the actions list on these screens.

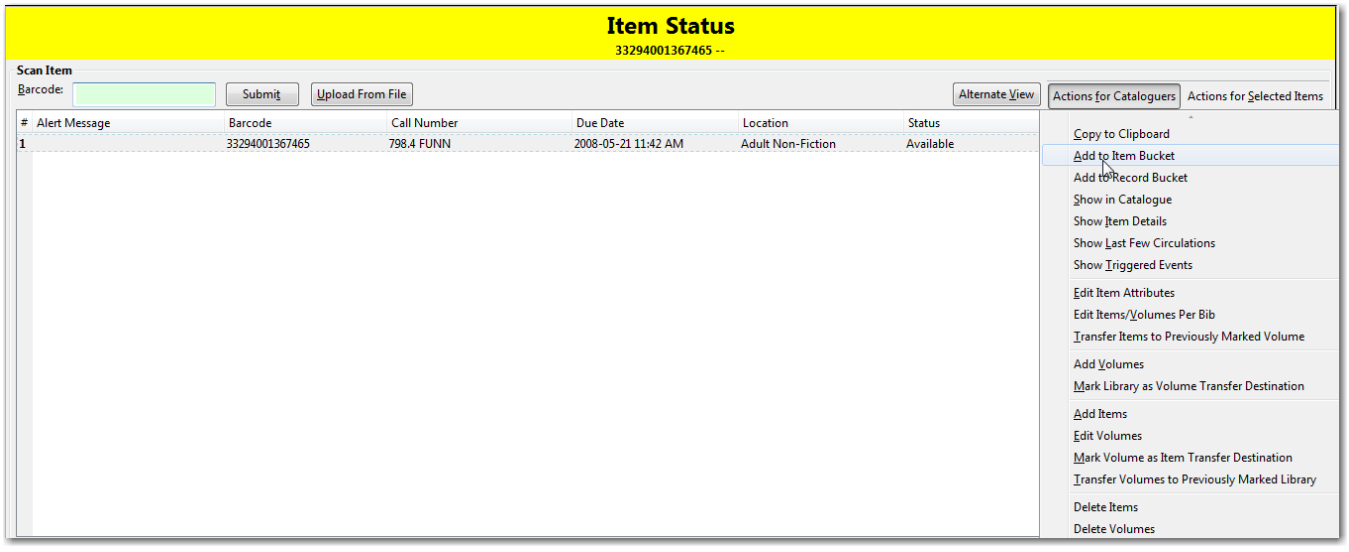
To add a copy record to a copy bucket from the *Holdings Maintenance* screen, highlight the item and choose *Actions for Selected Rows → Add Items to Buckets*.



You can either add to an existing bucket, or a new bucket.



To add copy records to a copy bucket on the *Item Status* (**F5**) screen. From the *Item Status* screen select required record(s) and choose *Actions for Cataloguers → Add to Item Bucket*, as shown below, or choose *Actions for Selected Items → Add to Item Bucket*.



You may highlight multiple items and add all of them to a copy bucket at one time.

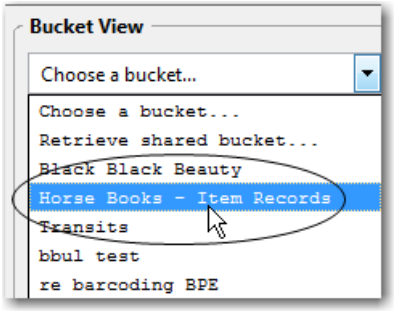
17.2. Working with Copies in a bucket

Once you have your records in a bucket there are a variety of functions you can do from within that bucket.

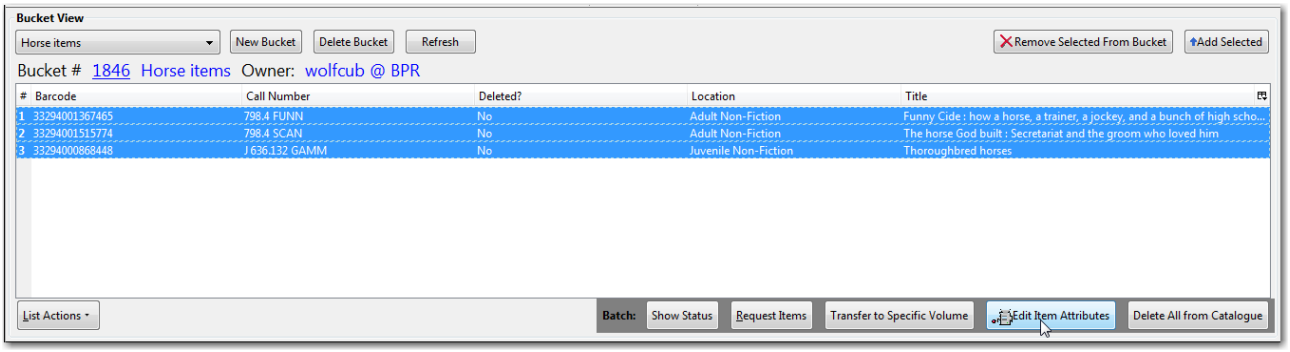
One of the most common functions is to batch edit records. This example demonstrates batch editing the shelving location of a handful of copy records.

1. Access your *Copy Bucket* view by choosing *Edit* → *Copy Buckets*, or *Cataloguing* → *Manage Copy Buckets*.

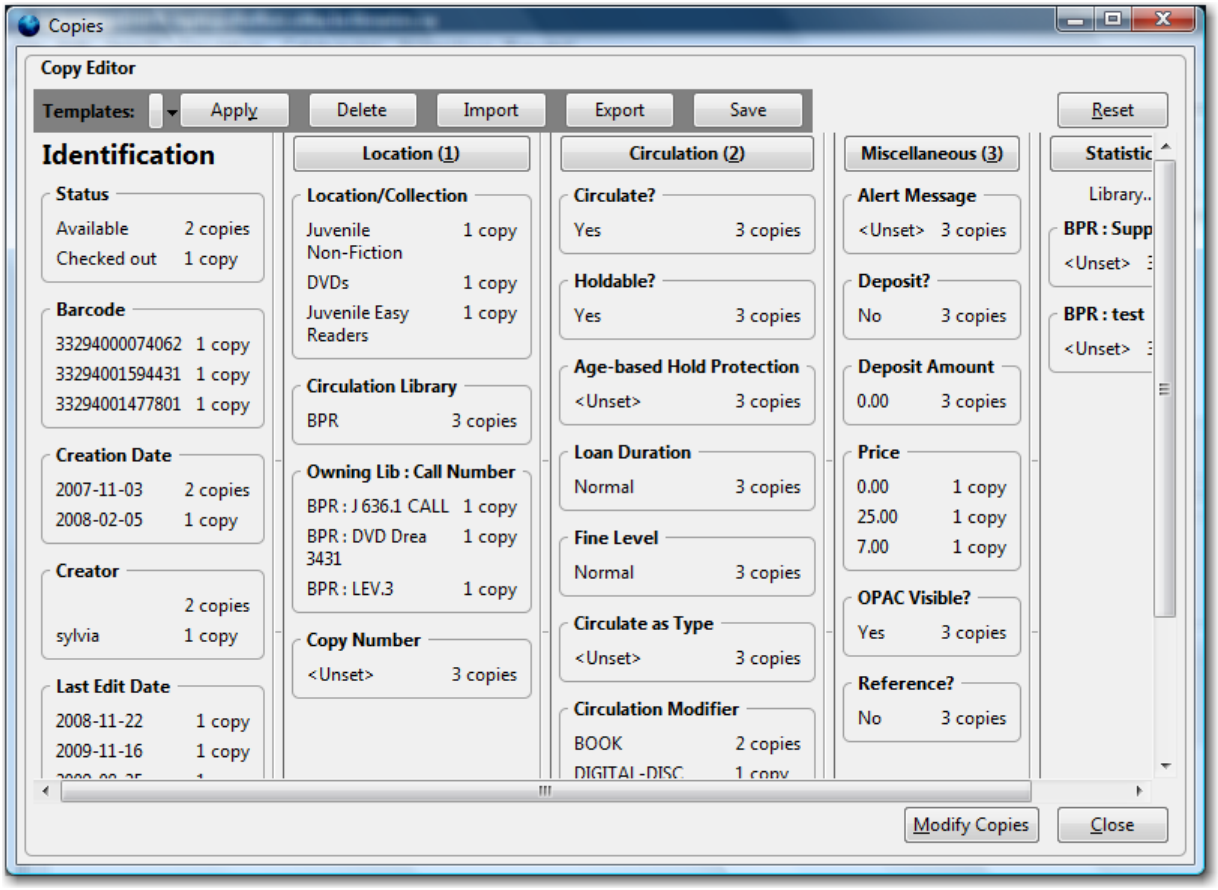
2. Select appropriate bucket from drop down menu.



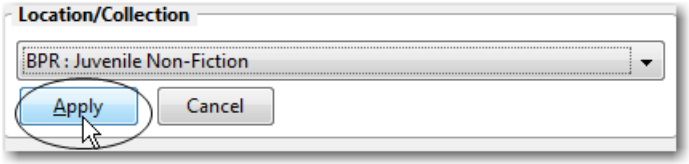
3. When bucket is displayed, click *Edit Item Attributes*.


Bucket View
Horse items
New Bucket
Delete Bucket
Refresh
Remove Selected From Bucket
Add Selected
Bucket # 1846 Horse items Owner: wolfcub @ BPR
Barcode Call Number Deleted? Location Title
1 33294001367465 798.4 FUNN No Adult Non-Fiction Funny Cide : how a horse, a trainer, a jockey, and a bunch of high scho...
2 33294001515774 798.4 SCAN No Adult Non-Fiction The horse God built : Secretariat and the groom who loved him
3 33294000868448 J 636.132 GAMM No Juvenile Non-Fiction Thoroughbred horses
List Actions
Batch:
Show Status
Request Items
Transfer to Specific Volume
Edit Item Attributes
Delete All from Catalogue

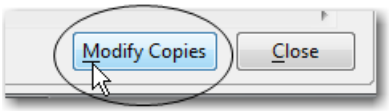
4. The Copy Editor window opens. Note all the barcodes, different call numbers and shelving locations are displayed.



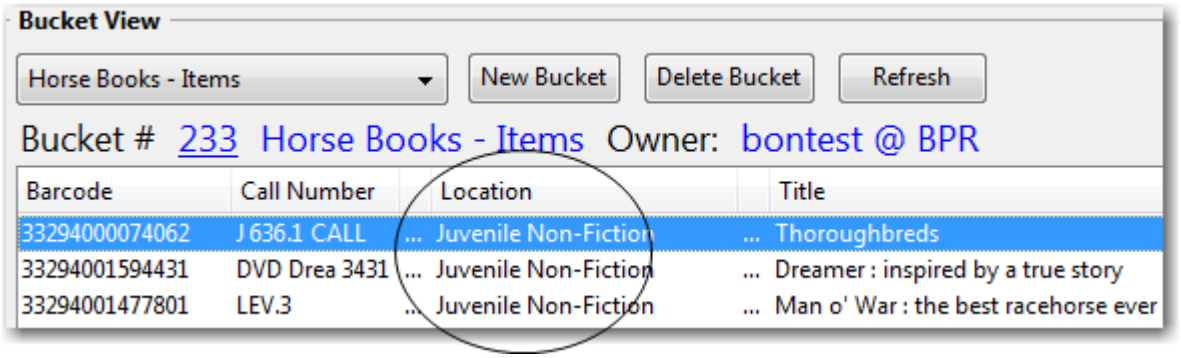
5. Select required shelving location and click *Apply*, just as if editing one record.



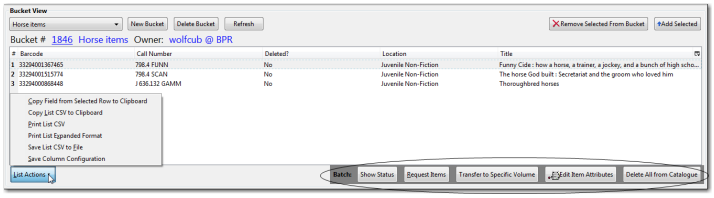
6. Click *Modify Copies* at bottom right of screen.



7. All your items' shelving locations have been changed.

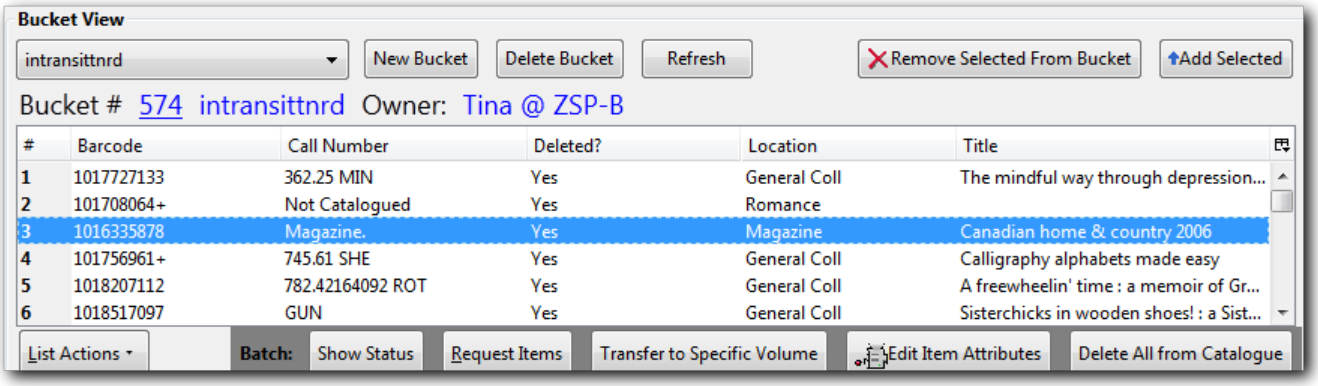


This screenshot shows some of the other functions you can do from within a Copy Bucket. If you are deleting items it is good practice to display Item Status field from the Column picker, and confirm suitable status of items to be deleted.



17.3. Removing a Copy from a Bucket

To remove a record from a bucket, on *Bucket View*, select the item and click *Remove Selected from Bucket*.

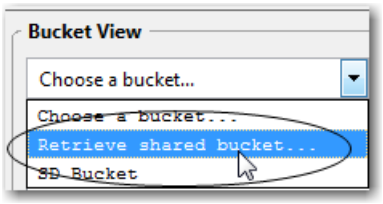

Bucket View
intransittnrd
New Bucket
Delete Bucket
Refresh
Remove Selected From Bucket
Add Selected
Bucket # 574 intransittnrd Owner: Tina @ ZSP-B
#
Barcode
Call Number
Deleted?
Location
Title
1 1017727133 362.25 MIN Yes General Coll The mindful way through depression...
2 101708064+ Not Catalogued Yes Romance
3 1016335878 Magazine. Yes Magazine Canadian home & country 2006
4 101756961+ 745.61 SHE Yes General Coll Calligraphy alphabets made easy
5 1018207112 782.42164092 ROT Yes General Coll A freewheelin' time : a memoir of Gr...
6 1018517097 GUN Yes General Coll Sisterchicks in wooden shoes! : a Sist...
List Actions
Batch:
Show Status
Request Items
Transfer to Specific Volume
Edit Item Attributes
Delete All from Catalogue

You may move some items to the pending area by selecting them and clicking *Add Selected* beside *Remove Selected from Bucket*. You may temporarily remove these items from the bucket to apply changes to the remaining items, then move these items back to the bucket once the editing is done. Or you may retrieve another copy bucket and add the items to it.

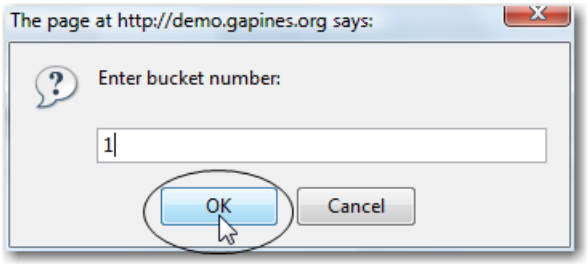
17.4. Retrieving Shared Buckets

1. Access copy bucket management screen by going to *Edit* → *Copy Bucket*.

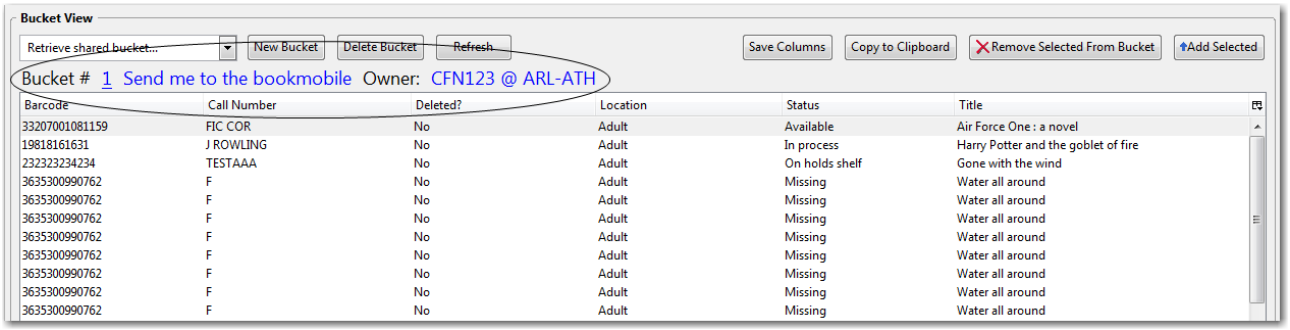
2. In drop down menu beside *Choose a bucket…* select *Retrieve shared bucket*.



3. Enter bucket number as told to you by the bucket creator and click *OK*.



4. The requested bucket is displayed. Note bucket number and owning library is displayed.


Bucket View
Retrieve shared bucket...
New Bucket
Delete Bucket
Refresh
Save Columns
Copy to Clipboard
Remove Selected From Bucket
Add Selected
Bucket # 1 Send me to the bookmobile Owner: CFN123 @ ARL-ATH
Barcode
Call Number
Deleted?
Location
Status
Title
3320700108115 9 FIC COR No Adult Available Air Force One : a novel
19818161631 J ROWLING No Adult In process Harry Potter and the goblet of fire
232323234234 TESTAAA No Adult On holds shelf Gone with the wind
3635300990762 F No Adult Missing Water all around
3635300990762 F No Adult Missing Water all around
3635300990762 F No Adult Missing Water all around
3635300990762 F No Adult Missing Water all around
3635300990762 F No Adult Missing Water all around
3635300990762 F No Adult Missing Water all around
3635300990762 F No Adult Missing Water all around
3635300990762 F No Adult Missing Water all around

5. You are now able to work with the records in the bucket.

Bucket numbers are assigned by Evergreen. Bucket number and owner are displayed whenever a bucket is retrieved.

Chapter 18. Adding Bibliographic Records to the Database

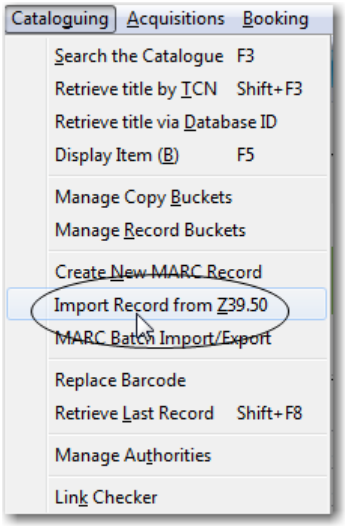
When there is no matching MARC record for your item, you may import one from the Z39.50 sources or the files supplied by your vendors. Or you may create a new MARC record if you can not find one from other sources.

18.1. MARC Records via Z39.50 Interface

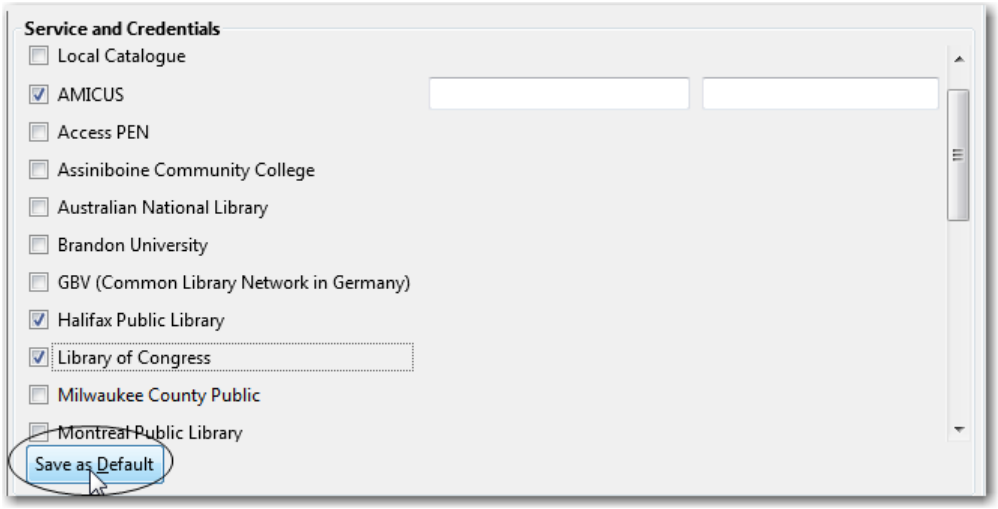
It is good practice and Sitka policy to check the Evergreen database for existing records before importing a record. You may search the catalogue first. Or you can configure the Z39.50 screen to search the Sitka Evergreen database as well as multiple Z39.50 targets at once. If searching Evergreen via the Z39.50 screen and you find a record, it is best practice and Sitka policy to then find that record in the catalogue and attach your holdings to it. If you have confirmed that there is no record in Evergreen that matches the item in your hand, but have found a record in another database, simply import the new record into Evergreen and then attach holdings.

18.1.1. Importing Records via Z39.50 Interface

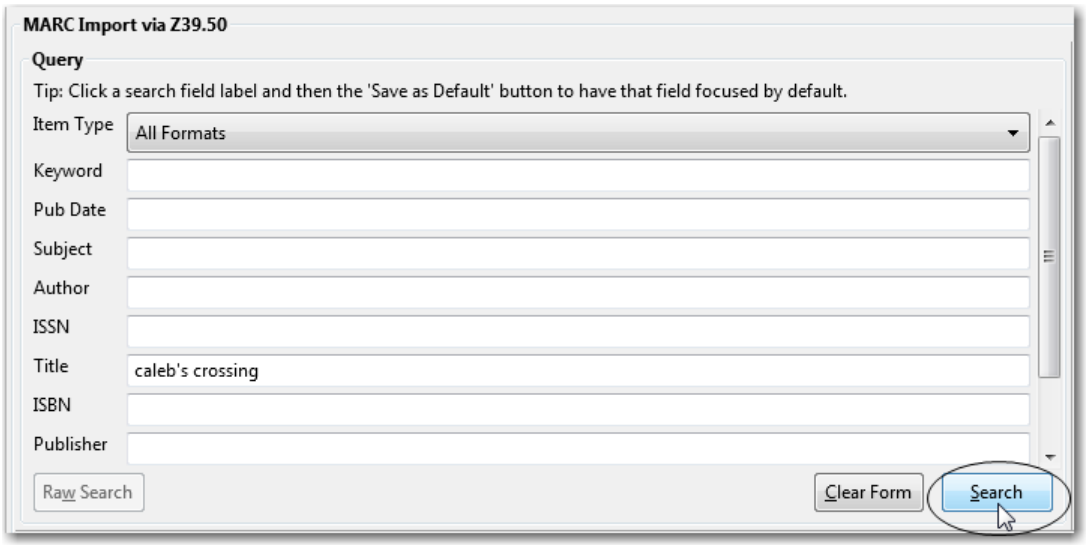
1. To access Z39.50 interface, select *Cataloguing* → *Import Record from Z39.50*



2. Select single or multiple pre-configured Z39.50 targets from the list. Note that most free targets do not have a User name or Password field. Some free targets and the subscription services held by some Sitka libraries require login. Once you have made your choices, click *Save as Default* to save the services you usually search and any user names and passwords you have entered. They will be automatically selected the next time you open the Z39.50 screen.

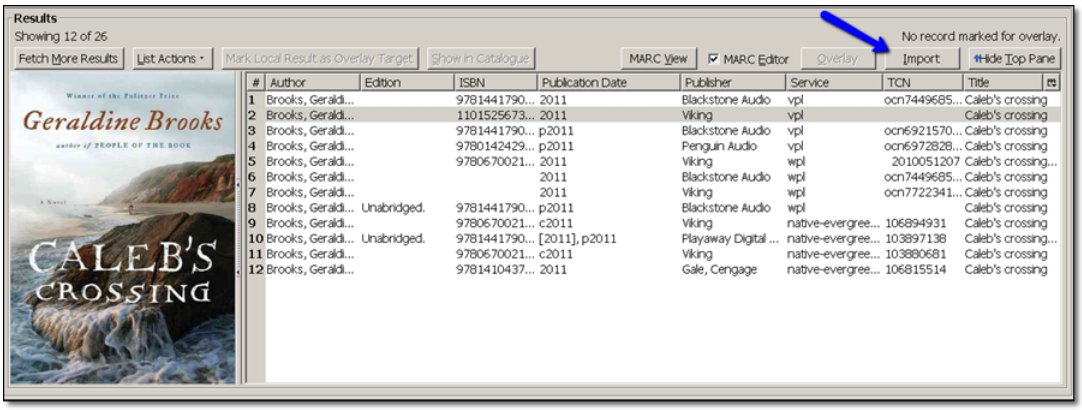


3. Fill in preferred search criteria and click *Search*. Note that the active search fields will change depending on the targets you select. Different targets may support different search types. For instance, Keyword and Subject will only be active if the local catalogue is selected. When you select multiple targets to search, an active box may apply to only one target.



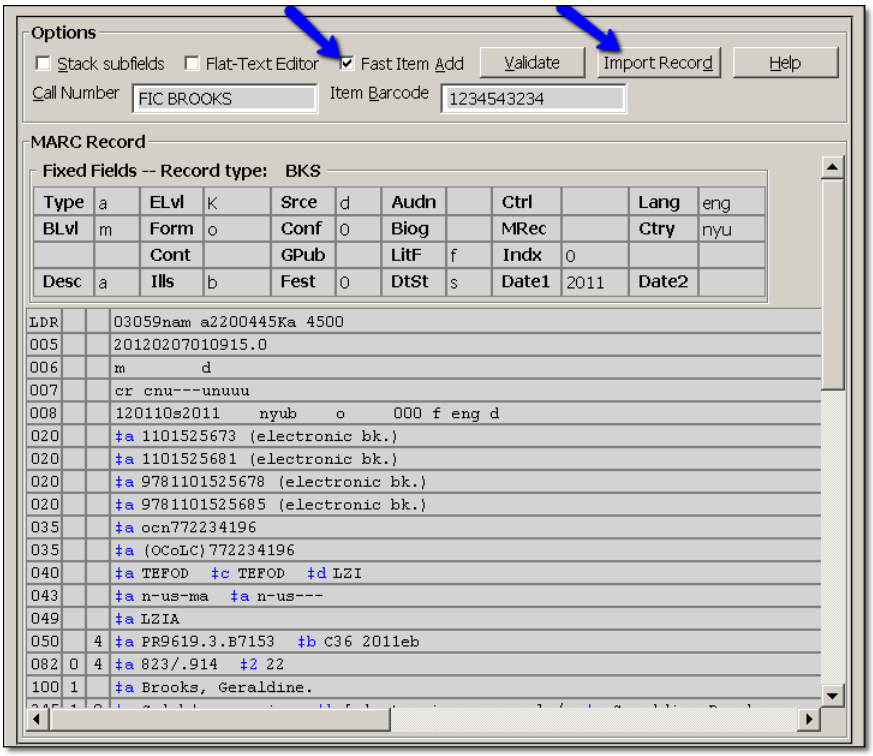
4. Search results are displayed in the lower pane. You may click on *Hide Top Pane* to make more space for the result list. You may *Fetch More Results*, if applicable. Information about each retrieved record appears on a separate summary line, with various columns of information. If a cover image is available, it will display as well. The *Service* column indicates where the record was found. If "native-evergreen-catalog" is listed in this column, the record is in Evergreen. You may view MARC records, choose to import or overlay MARC records. This example demonstrates importing a record.

   To import a record, choose the record from the results list that you would like to import. You should view the record first by choosing *MARC View*. When you are sure you have chosen the correct record to import, click *Import*.


Results
Showing 12 of 26
No record marked for overlay.
Fetch More Results
List Actions
Mark Local Result as Overlay Target
Show in Catalogue
MARC View
MARC Editor
Overlay
Import
Hide Top Pane
Geraldine Brooks
CALEB'S CROSSING
Author Edition ISBN Publication Date Publisher Service TCN Title
1 Brooks, Geraldi... 9781441790... 2011 Blackstone Audio vpl ocn7449685... Caleb's crossing
2 Brooks, Geraldi... 1101525673... 2011 Viking vpl Caleb's crossing
3 Brooks, Geraldi... 9781441790... p2011 Blackstone Audio vpl ocn6921570... Caleb's crossing
4 Brooks, Geraldi... 9780142429... p2011 Penguin Audio vpl ocn6972828... Caleb's crossing
5 Brooks, Geraldi... 9780670021... 2011 Viking wpl 2010051207 Caleb's crossing...
6 Brooks, Geraldi... 2011 Blackstone Audio wpl ocn7449685... Caleb's crossing
7 Brooks, Geraldi... 2011 Viking wpl ocn7722341... Caleb's crossing
8 Brooks, Geraldi... Unabridged. 9781441790... p2011 Blackstone Audio wpl Caleb's crossing
9 Brooks, Geraldi... 9780670021... c2011 Viking native-evergree... 106894931 Caleb's crossing
10 Brooks, Geraldi... Unabridged. 9781441790... [2011], p2011 Playaway Digital ... native-evergree... 103897138 Caleb's crossing...
11 Brooks, Geraldi... 9780670021... c2011 Viking native-evergree... 103880681 Caleb's crossing
12 Brooks, Geraldi... 9781410437... 2011 Gale, Cengage native-evergree... 106815514 Caleb's crossing

Sitka has profiled certain fields, primarily 9xx fields, to be automatically stripped when records are imported through Z39.50. The default fields that are stripped are 906, 923, 925, 936, 948, 955, 959, 963. Please contact Co-op support if you would like to see additional fields automatically stripped.

5. The record opens in the *MARC Editor*. From here you can edit fixed and bibliographic fields. Note that you may also select *Fast Item Add* and input call number and barcode data from this screen. Once your edits are complete, click *Import Record*.


Options
Stack subfields
Flat-Text Editor
Fast Item Add
Validate
Import Record
Help
Call Number
FIC BROOKS
Item Barcode
1234543234
MARC Record
Fixed Fields -- Record type: BKS
Type a ELvl K Srce d Audn Ctrl Lang eng
BLvl m Form o Conf 0 Biog MRec Ctry nyu
Cont GPub LitF f Indx 0
Desc a Ills b Fest 0 DtSt s Date1 2011 Date2
LDR 03059nam a2200445Ka 4500
005 20120207010915.0
006 m d
007 cr cnu---unuuu
008 120110s2011 nyub o 000 f eng d
020 ‡a 1101525673 (electronic bk.)
020 ‡a 1101525681 (electronic bk.)
020 ‡a 9781101525678 (electronic bk.)
020 ‡a 9781101525685 (electronic bk.)
035 ‡a ocn772234196
035 ‡a (OCoLC)772234196
040 ‡a TEFOD ‡c TEFOD ‡d LZI
043 ‡a n-us-ma ‡a n-us---
049 ‡a LZIA
050 4 ‡a PR9619.3.B7153 ‡b C36 2011eb
082 0 4 ‡a 823/.914 ‡2 22
100 1 ‡a Brooks, Geraldine.

6. Copy Editor will be loaded for you to edit the item record.

7. Once the item record is saved, the imported MARC record and the newly created item record will be displayed on Record Details screen.

If you did not utilize *Fast Item Add* as described above, the Copy Editor will not be loaded. Instead, the newly imported record will be displayed in a new tab. You may now attach holdings as described in Chapter 14, *Adding Holdings to Existing Records in the Sitka Database*.

18.1.2. Overlaying Records via Z39.50 Interface

There are times when it is necessary to overlay an existing MARC record in Evergreen with a better MARC record from a Z39.50 target. This lesson will demonstrate the steps required to achieve an overlay. Overlaying a MARC record replaces an existing MARC record and leaves all holdings, and corresponding holds, active circulations, bills, and fines intact. As overlay affects all libraries sharing a MARC record it is critical that this procedure be done judiciously and correctly. Please refer to Sitka's cataloguing policy, Co-op support, or your library's cataloguing mentor, if in place, for more information about this process and its effect on the shared database.

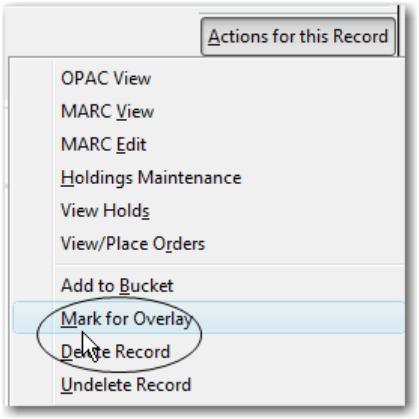
Marking a Record for Overlay

You must first identify the MARC record in Evergreen, which you wish to be overlaid. You do this by "marking" it for overlay. The marked-for-overlay effect is temporary for a login session, and only one record at a time can be marked. When you mark another record, the previous record is unmarked. Once a record is marked, it stays marked until it is overlaid, or another record is marked, or you log out of Evergreen. Therefore, you can mark and overlay one record at a time, following through the entire process to completion before moving on to another record.

1. Select *Cataloguing → Search the Catalogue*, *Search → Search the Catalogue* or press **F3** to search Evergreen for the record that needs to be overlaid. It is best practice to start with a fresh search screen so that all prior searches are cancelled. This ensures the correct title record is opened and marked.

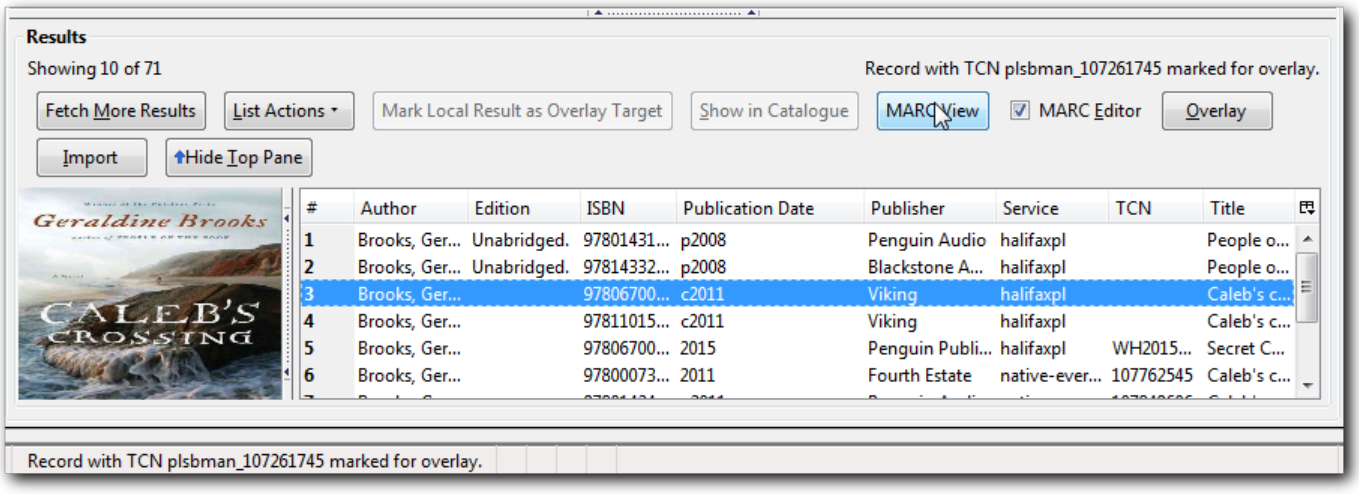
2. Click on title link to display the record details. It is important that you ensure the record is fully loaded on screen and displaying title information for the correct record in the top Record Summary area.

3. Select *Actions for this Record → Mark for Overlay*. Record is now “marked”. You will see "Record with TCN xxxxxxxx Marked for Overlay" displayed at the bottom of the screen.

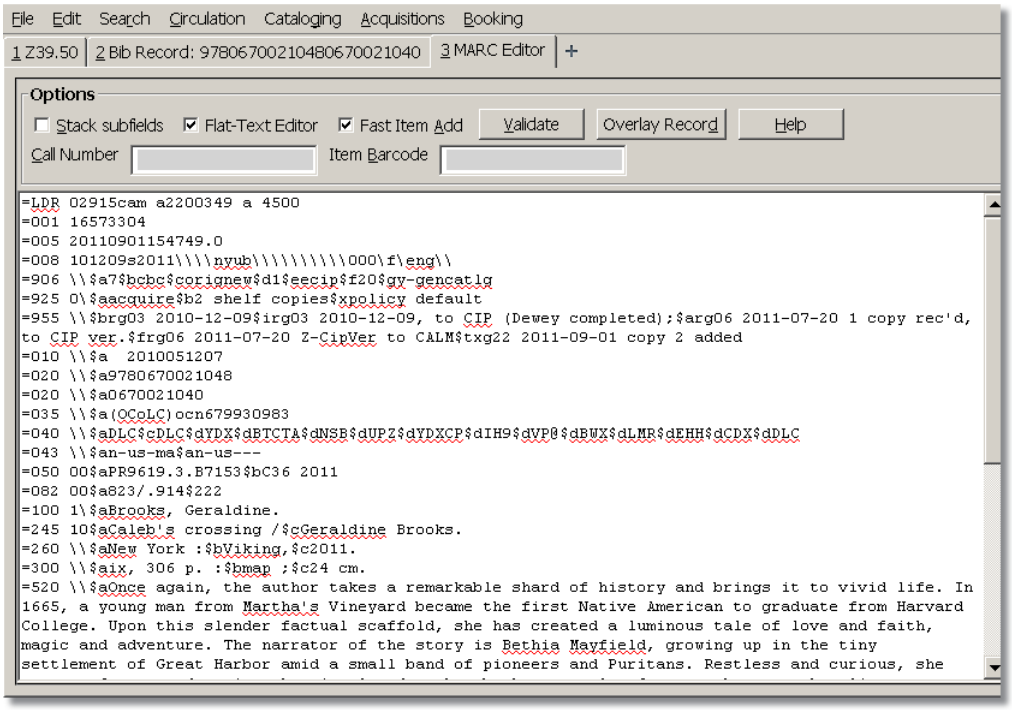


Overlaying Using Z39.50

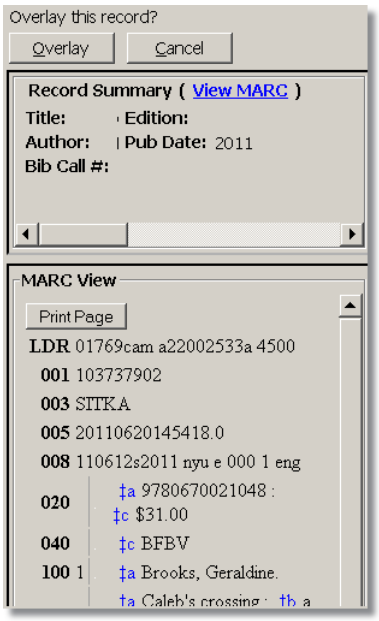
1. Go to *Import Record from Z39.50* to find a target record as described in Section 18.1.1, “Importing Records via Z39.50 Interface”. This record should be a fuller and better catalogued record than the one you are overlaying. You may select potential records on the list based on the summary. Click on *MARC View* to see the full MARC record. Go back to *Result View* to highlight your selected target, then click *Overlay*. You are then given the opportunity to edit the record before overlaying.


Results
Showing 10 of 71
Record with TCN plsbman_107261745 marked for overlay.
Fetch More Results
List Actions
Mark Local Result as Overlay Target
Show in Catalogue
MARC View
MARC Editor
Overlay
Import
Hide Top Pane
Author Edition ISBN Publication Date Publisher Service TCN Title
1 Brooks, Ger... Unabridged. 97801431... p2008 Penguin Audio halifaxpl People o...
2 Brooks, Ger... Unabridged. 97814332... p2008 Blackstone A... halifaxpl People o...
3 Brooks, Ger... 97806700... c2011 Viking halifaxpl Caleb's c...
4 Brooks, Ger... 97811015... c2011 Viking halifaxpl Caleb's c...
5 Brooks, Ger... 97806700... 2015 Penguin Publi... halifaxpl WH2015... Secret C...
6 Brooks, Ger... 97800073... 2011 Fourth Estate native-ever... 107762545 Caleb's c...
Record with TCN plsbman_107261745 marked for overlay.

2. The record opens in the *MARC Editor*. From here you can edit fixed and bibliographic fields. Note that you may also select *Fast Item Add* and input call number and barcode data from this screen. Once your edits are complete, click *Overlay Record*. Below screen shows the MARC record in *Flat Text Editor*.


File Edit Search Circulation Cataloging Acquisitions Booking
1 Z39.50
2 Bib Record: 9780670021048 0670021040
3 MARC Editor
Options
Stack subfields
Flat-Text Editor
Fast Item Add
Validate
Overlay Record
Help
Call Number
Item Barcode
=LDR 02915cam a2200349 a 4500
=001 16573304
=005 20110901154749.0
=008 101209s2011\\\\nyub\\\\\\\\\\000\f\eng\\
=906 \\$a7$bcbc$corignew$d1$eecip$f20$gy-gencatlg
=925 0\$aacquire$b2 shelf copies$xpolicy default
=955 \\$brg03 2010-12-09$irg03 2010-12-09, to CIP (Dewey completed);$arg06 2011-07-20 1 copy rec'd,
to CIP ver.$frg06 2011-07-20 Z-CipVer to CALM$txg22 2011-09-01 copy 2 added
=010 \\$a 2010051207
=020 \\$a9780670021048
=020 \\$a0670021040
=035 \\$a(OCoLC)ocn679930983
=040 \\$aDLC$cDLC$dYDX$dBTCTA$dNSB$dUPZ$dYDXCP$dIH9$dVP@$dBWX$dLMR$dEHH$dCDX$dDLC
=043 \\$an-us-ma$an-us---
=050 00$aPR9619.3.B7153$bC36 2011
=082 00$a823/.914$222
=100 1\$aBrooks, Geraldine.
=245 10$aCaleb's crossing /$cGeraldine Brooks.
=260 \\$aNew York :$bViking,$c2011.
=300 \\$aix, 306 p. :$bmap ;$c24 cm.
=520 \\$aOnce again, the author takes a remarkable shard of history and brings it to vivid life. In
1665, a young man from Martha's Vineyard became the first Native American to graduate from Harvard
College. Upon this slender factual scaffold, she has created a luminous tale of love and faith,
magic and adventure. The narrator of the story is Bethia Mayfield, growing up in the tiny
settlement of Great Harbor amid a small band of pioneers and Puritans. Restless and curious, she

3. Next, you are asked to confirm that the marked record is the one you want to overlay. You can view the record at this time. Confirm that this is the correct record by clicking *Overlay*.



4. You have successfully overlaid the record. The Copy Editor will be loaded if you have chosen to Fast Add Item, or you will see the bibliographic record displayed in a new tab.

You may search the Evergreen database by searching *Local Catalogue* on the Z39.50 interface. On the result list, you may highlight a record and mark it as the overlay target by using the *Mark Local Result as Overlay Target* button. Before you do so, you need to view the full record to make sure this is the correct record to be overlaid. If you wish to check holdings, you may use the *Show in Catalgoue* button to display the record in the catalogue in a new tab.

If the record that you wish to overlay contains local information, e.g. tag 590 or 690, you need to manually add these tags to the record you intend to import. You may add the tags before overlaying. Or, you may import the record first, then merge the two records. When merging the records, the two records will be displayed side-by-side on screen, which makes it easier to copy over the local tags from the non-lead record.

18.2. MARC Batch Import

18.2.1. Import MARC Records

If the title records you need are not already in the Evergreen database it is possible to upload vendor-supplied MARC files into Evergreen. Each file may contain one or more MARC records. During the uploading process, Evergreen matches each record in the file with existing records in Evergreen based on pre-defined match points called *Record Match Sets*. Records without matches may be imported directly into the catalogue. Records with matches must be examined by cataloguers. Due to the nature of Sitka's shared database, the Co-op suppport strongly advises against allowing Evergreen to select a merge target and cautions you to adhere to instructions for selecting a match as outlined in this chapter.

During the importing process, all records in the file are first uploaded to the server and kept outside the catalogue as a queue, which is viewable on the *MARC Batch Import/Export → Inspect Queue* screen. Cataloguers can view both the incoming and existing matching records to decide which one to use. You may merge the records with either the incoming or existing record as the lead while keeping some MARC tags in both records. *Overlay/Merge Profile* decides how two records are merged.

Do not load a MARC file of more than 1000 records, as the importing process can time out. If you have more than 1000 records, please break into multiple files.

Holding records can be created if the incoming MARC records contain holding information in pre-defined format. Contact Co-op support about the acceptable format if you want to load holding records.

All records in a queue can be exported to a CSV file or printed in non-MARC format (emailing is not available yet). All records imported from a single queue can be added to a *Record Bucket*.

There are some settings, namely *Record Display Attributes*,*Record Match Sets*, *Merge/Overlay Profiles* and *Import Item Attributes* on this screen that are reserved for Sitka server administration. You should not attempt to edit them as they affect all bibliographic records.

Record Display Attributes set what fields will display on *Inspect Queue* screen, once a file of records have been loaded. Important descriptive MARC tags and control numbers are selected to display.

Record Match Sets are profiles set up by Sitka to allow for different match points to be used when loading records. The default profile is *SitkaMatch*. It matches on the 901c (record id), 010a (LC Control Number), 020a

(ISBN), 022a (ISSN), or 035a (System Control Number). It is used in the majority of record loads. The other profiles are only used to load special records. Please contact Co-op support for which profile to use if your records require a set of different match points to load.

Merge/Overlay Profiles control how the incoming and existing MARC records are merged. Two profiles have been created for all Sitka libraries to use: *Merge Using INCOMING Record* and *Merge Using EXISTING Record*.

- *Merge Using INCOMING Record*: all tags in the INCOMING record will be brought into the final record. Tags: 092, 590, 690, 852 and 856 in the ORIGINAL record will be preserved in the final record. The rest will be removed.

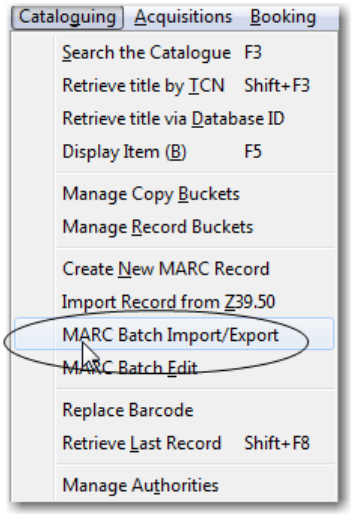
- *Merge Using EXISTING Record*: all tags in the ORIGINAL record will be kept. Tags: 092, 590, 690, 852 and 856 in the INCOMING record will be brought into the final record. The rest will be removed upon merge.

These profiles ensure local data in these five fields in a merged MARC record is never overwritten, and holding records (in tag 852) can be loaded to either the existing MARC record or with the incoming record.

Import Item Attributes are profiles set up by Sitka to allow importing of item records with vendor supplied MARC records. The vendor will need to send item level information in a local MARC tag and subfields (eg. 9xx or 852), and this information can be mapped into item records when the bibliographic records are loaded. Please contact Co-op support if you are interested in loading item records with your bibliographic records.

18.2.2. Uploading MARC Record Files

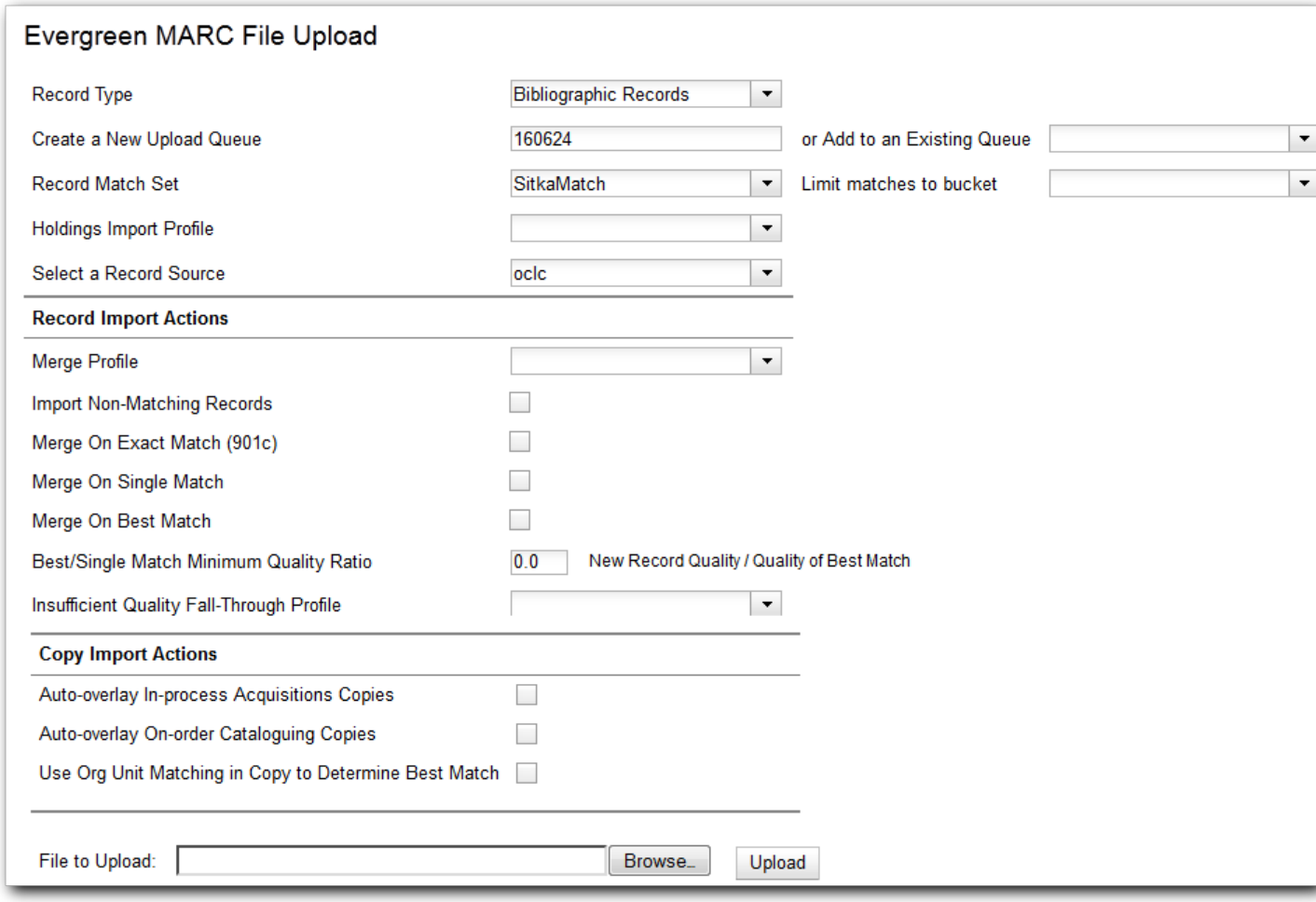
1. Select *Cataloguing* → *MARC Batch Import/Export*



2. The *MARC File Upload* screen opens.

You may create a new queue for the file you are to upload or append the file's records to an existing queue. To create a new queue, type in a name for your file in the box beside *Create a New Upload Queue*. To append records to an existing queue, choose a queue from the dropdown list beside *Add to an Existing Queue*.

Do not use "/" or "\" (slash or backslash) in import queue name.



3. Leave *SitkaMatch* in *Record Match Set* box.

The *NoMatch* profile matches records on tag 901$c only, and should only be used after a false match is detected using *SitkaMatch* as described below. Sitka cataloguing policy strives to avoid record duplication so Sitka policy requires batch imports use *SitkaMatch* first.

4. Choose a *Holdings Import Profile* from the dropdown list if your MARC records include holdings information and you wish to load it.

You need to contact Co-op support for holding information format before asking your vendors to include it in the MARC records.

5. *Select a Record Source* from the dropdown. The default is *oclc*, but choose the one that best matches your file (eg. ULS, Whitehots etc.) Contact Co-op support if you need to load records for non-physical items, such as an e-record collection like ebrary.

6. You do not need to choose a *Merge Profile* now.

7. Check *Import Non-Matching Records* box to automatically import records without matches into the catalogue.

Co-op support strongly advises that you do not select other import options. These options allow Evergreen to automatically merge records before you inspect them. It is best practice to inspect the potentially merged records first.

If you want to view your incoming records first without importing any, you may leave *Import Non-Matching Records* box unchecked. You will be able to view all records in the file on Inspect Queue and import all/selected records with/without matching records there.

8. You do not need to select any of the checkbox in *Copy Import Actions* now.

9. Click *Browse...* to choose the source MARC file on your computer, then click *Upload*. Depending on the size of the file, it may take a while for the uploading to finish. Once it is finished, records will be displayed in *Inspect Queue* view. You may continue to examine and import records in the queue as described below. Or you may come back later to find the queue to examine and import the records.

Records in a queue are saved on the server, but outside the catalogue. By importing, you bring the records into the catalogue.

18.2.3. Importing and Merging Records from Queues

If you want to import records from queues uploaded before, go to *Cataloguing* → *MARC Batch Export/Import*, then click *Inspect Queue*. Click the queue that you wish to examine and import records from. The Queue Summary screen will open.

If you continue to import records right after uploading the MARC file, the Queue Summary screen is loaded after you uploaded the file.

1. The *Queue Summary* shows the total number of MARC records in the queue, and items contained in these records, if any, how many of them have been imported, and how many of them encountered an error when Evergreen attempted to import them.

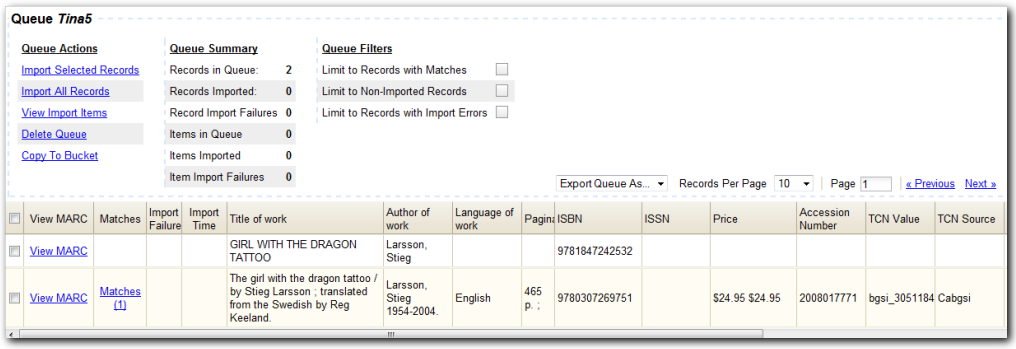
   Queue Filter allows you to display only the selected type of records in the table below.

   A selected number of records (10, 20, 50, 100) are displayed per page. Use the dropdown list beside *Records per Page* to select your preferred number. Use *Previous* and *Next* to flip over the page.

   The records in the queue can be exported in non-MARC format via the method selected from the *Export Queue As* dropdown list. (Exporting via email is not currently functional.)

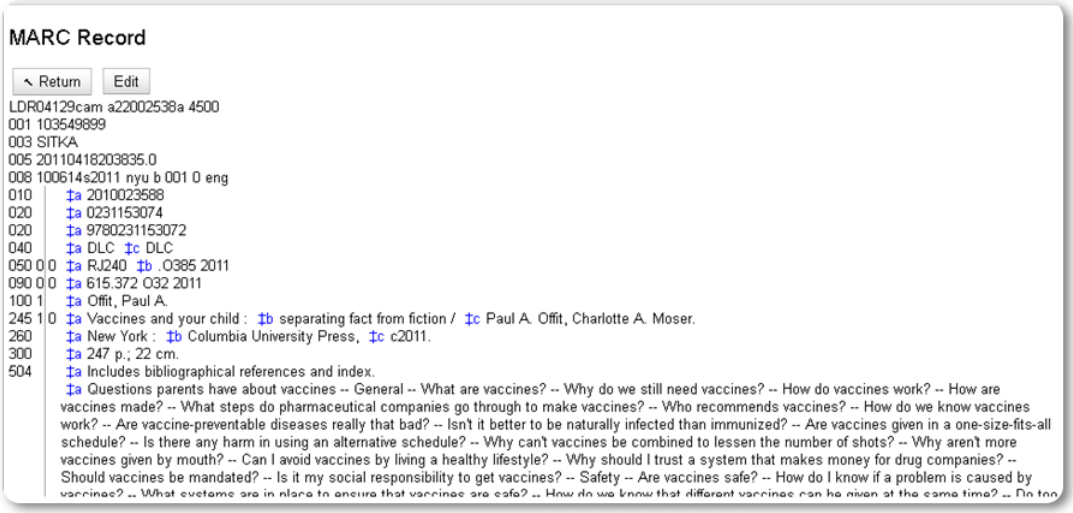
   If you imported items via the MARC records, you may view them by *View Import Items*.

   You may add all imported MARC records in the queue to a Record Bucket by using *Copy to Bucket*.



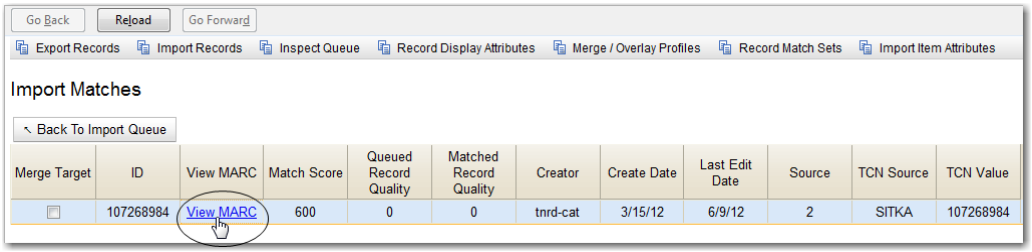
2. You can view both incoming and existing match records, if any, to determine which record to use. The links in *View MARC* column lead you to the incoming records, while records in the *Matches* column link to existing records. A blank in the *Matches* column means no match record has been found.

3. Click the blue coloured *View MARC* link to view the incoming record. You may edit it before importing by clicking *Edit*. Once editing is complete, click *Save Changes*. Click *Return* to go back to the *Record Queue* screen.


MARC Record
Return
Edit
LDR04129cam a22002538a 4500
001 103549899
003 SITKA
005 20110418203835.0
008 100614s2011 nyu b 001 0 eng
010 ‡a 2010023588
020 ‡a 0231153074
020 ‡a 9780231153072
040 ‡a DLC ‡c DLC
050 0 0 ‡a RJ240 ‡b .O385 2011
090 0 0 ‡a 615.372 O32 2011
100 1 ‡a Offit, Paul A.
245 1 0 ‡a Vaccines and your child : ‡b separating fact from fiction / ‡c Paul A. Offit, Charlotte A. Moser.
260 ‡a New York : ‡b Columbia University Press, ‡c c2011.
300 ‡a 247 p.; 22 cm.
504 ‡a Includes bibliographical references and index.
‡a Questions parents have about vaccines -- General -- What are vaccines? -- Why do we still need vaccines? -- How do vaccines work? -- How are vaccines made? -- What steps do pharmaceutical companies go through to make vaccines? -- Who recommends vaccines? -- How do we know vaccines work? -- Are vaccine-preventable diseases really that bad? -- Isn't it better to be naturally infected than immunized? -- Are vaccines given in a one-size-fits-all schedule? -- Is there any harm in using an alternative schedule? -- Why can't vaccines be combined to lessen the number of shots? -- Why aren't more vaccines given by mouth? -- Can I avoid vaccines by living a healthy lifestyle? -- Why should I trust a system that makes money for drug companies? -- Should vaccines be mandated? -- Is it my social responsibility to get vaccines? -- Safety -- Are vaccines safe? -- How do I know if a problem is caused by

4. On *Record Queue* screen click the blue coloured *Matches* link to view the match record. This takes you to the following *Import Matches* screen.

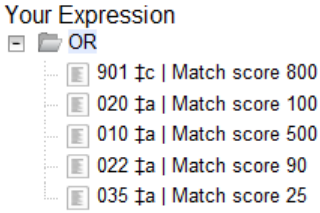
5. On the *Import Matches* screen, you will see the match record's ID number and some non-MARC information. Click *View MARC*. The existing MARC record is displayed in view mode. You can not edit it. Once done, click *Return* to go back to the *Import Matches* screen.



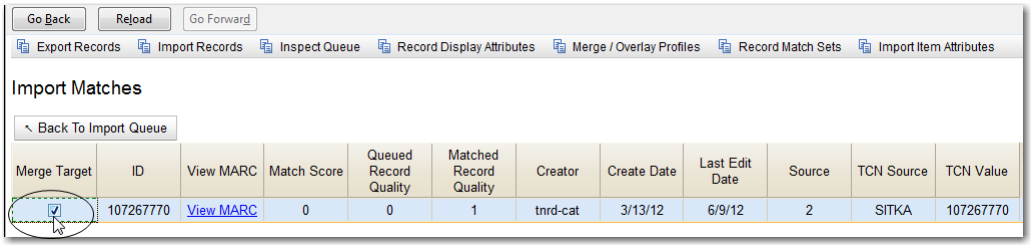
Match Score is the total score from all matched fields specified in the *Record Match Set*.

This list shows the matching points and the scores assigned to each point of *SitkaMatch*. Match scores are used to indicate how well two records are matched. For example, if two records contain the same value in tag 901$c, highly likely they are matches. So tag 901$c is assigned a very high score. If the incoming and existing records match on tag 010$a and 020$a, the match score will be 600.

Match Points & Scores of SitkaMatch Record Match Set



6. Upon inspecting both incoming and existing record(s), if the match record is a true match but a brief record, you may mark the match MARC record as a merge target by selecting the checkbox in front of the record in the *Merge Target* column. Click *Back to Import Queue* once done.



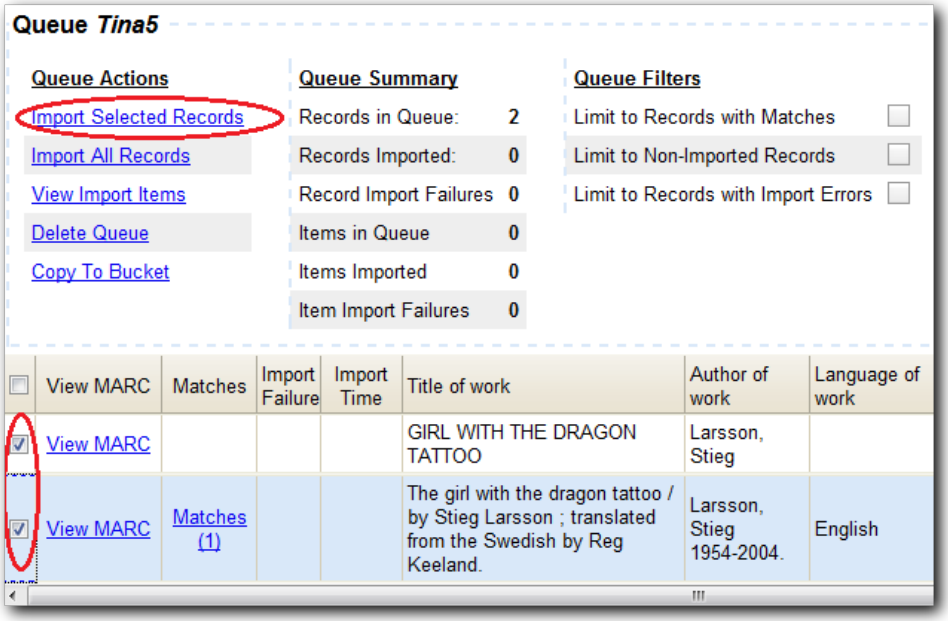
If the match record in Evergreen is a true match but a full record, Sitka policy requires you to use the existing record instead of importing another. Do not import the record.

However, if the incoming record contains local information in tags 092, 590, 690, 852 or 856 that you want to bring into the existing record, such as loading holding records to existing MARC records, you need to mark the match record as a merge target. In this scenario you would use the *Merge Using EXISTING Record* merge

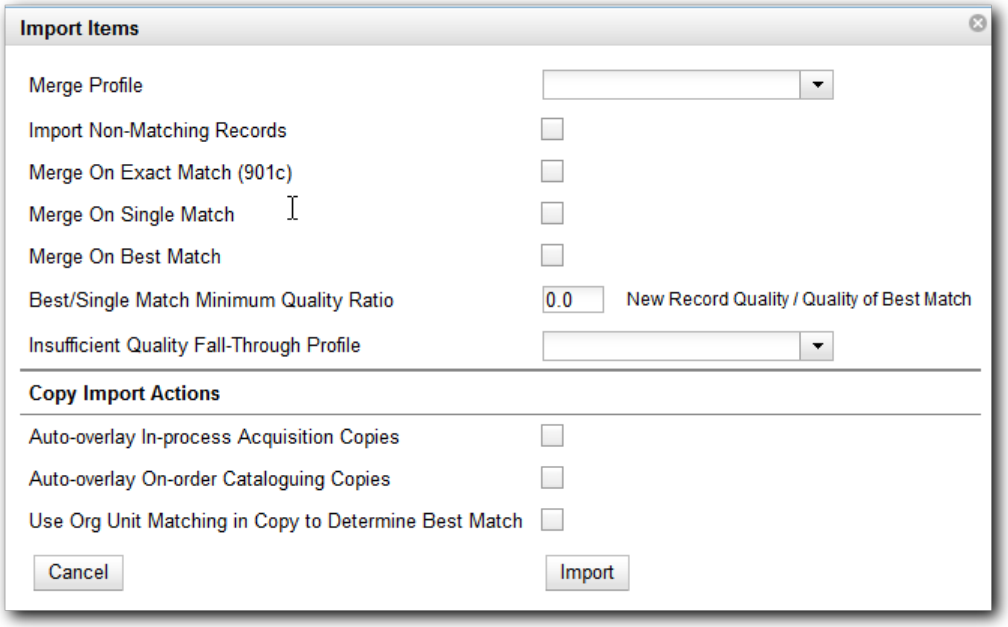
profile as described in next step. If you are interested in loading holdings/item information, please contact Co-op support to set it up.

7. If you have marked a merge target, the record is shown as selected once you are back on the *Record Queue* screen.

   You may inspect other records on the list. Once finished inspecting the list, click *Import Selected Records* under *Queue Actions*.



8. You are prompted to select import options. Make your choices and click *Import*.



For *Merge Profile*, choose one of the following based on which record should be the lead.

- *Merge Using INCOMING Record*: uses the incoming record as the lead. Information in existing record in tags 092, 590, 690, 852 (holdings) and 856 will be kept.

- *Merge Using EXISTING Record*: uses the existing record in the catalogue as the lead. Information in the incoming record in tags 092, 590, 690, 852 (holdings) and 856 will be kept. Use this profile when you attach holdings in your MARC file to existing Evergreen MARC records.

If you have marked a merge target, you do not need to select any further import options. The marked target will be merged. If you have not already imported non-matching records you can now select *Import Non-Matching Records*.

Merge On Exact Match (901c), Merge On Single Match, and Merge On Best Match are designed to allow Evergreen to programmatically select the best match. Due to the nature of Sitka's shared database, Sitka support strongly advises against allowing Evergreen to select a merge target and cautions you to adhere to instructions for selecting a match as outlined above.

Do not use *Best/Single Match Minimum Quality Ratio* or *Insufficient Quality Fall-Through Profile* at this time.

If you have On Order brief item records and wish to overlay them with full item records loaded via the MARC records, you need to select checkbox *Auto-overlay On-order Cataloguing Copies*. Evergreen will overlay the items having matching circulating library and On-order status.

If you load items for multiple branches or a branch other than your working location, you need to select checkbox *Use Org Unit Matching in Copy to Determine Best Match*, too.

The option *Auto-Overlay In-process Acquisitions Copies* should only be used if you are working with on-order line items created in the Acquisitions module. For more details please see Auto-Overlay In Process Acquisitions Copies

9. Once the records are imported, the display is back on *Queue Summary* screen. You will see the *Import Time* column is filled in for the selected records. The imported record id is displayed in *Imported As* column.

A record can be imported only once.

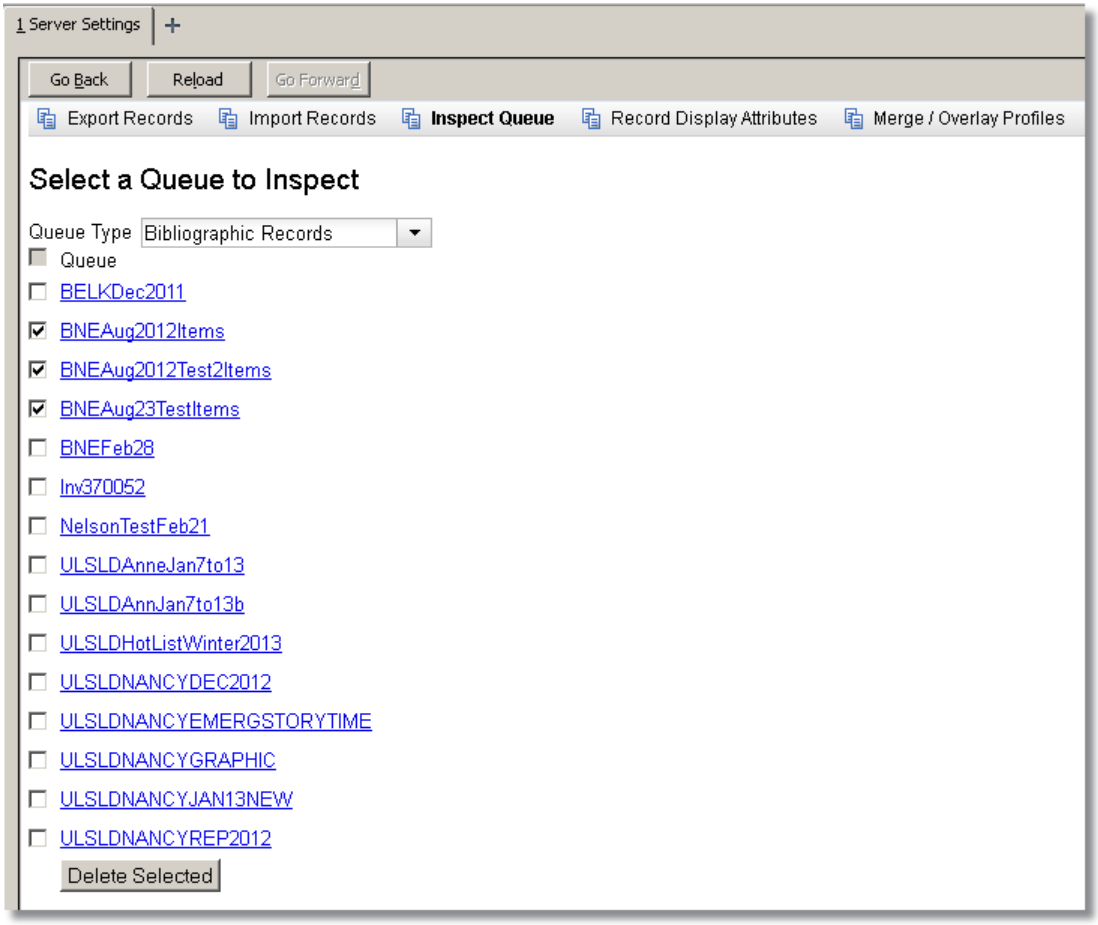
Sitka has profiled certain fields, primarily 9xx fields, to be automatically stripped when records are imported through Batch Import. The default fields that are stripped are 906, 923, 925, 936, 948, 955, 959, 963. Please contact Co-op support if you would like to see additional fields automatically stripped.

18.2.4. Managing Queues

Click *Cataloguing* → *MARC Batch Import/Export*. The default screen is *Import Records*. Click *Inspect Queue* tab to manage and view existing queues used in MARC Batch Import.

Under *Inspect Queue* you can click on an existing queue to view and import records that have already been queued for importing or simply view records that have already been imported.

To manage the queues, you can batch delete from the *Inspect Queue* interface by checking the box in front of the queue name and then choosing *Delete Selected*.



18.3. Sitka's Minimum MARC record

As there is an approved minimum level for original MARC records, the following may assist you when creating original MARC records in Evergreen. For more detailed information on MARC standards, the Library of Congress has the authoritative website at http://www.loc.gov/marc/

Here is an example of a MARC record that meets and exceeds minimum cataloguing standards for a book in a series.

LDR			01671cam a2200385 a 4500
001			12901170
005			20041228203623.0
008			020820s2003 nyub 000 1 eng
010			‡a 2002030595
020			‡a 0743233034 (alk. paper)
040			‡a DLC ‡c DLC ‡d DLC
043			‡a n-usp--
050	0	0	‡a PS3563.A319 ‡b W36 2003
082	0	0	‡a 813/.54 ‡2 21
100	1		‡a McMurtry, Larry.
245	1	4	‡a The wandering hill : ‡b a novel / ‡c Larry McMurtry.
260			‡a New York : ‡b Simon & Schuster, ‡c c2003.
300			‡a xiii, 302 p. : ‡b maps ; ‡c 25 cm.
490	1		‡a Berrybender narratives ; ‡v bk. 2
500			‡a Maps on endpapers.
650		0	‡a British ‡z West (U.S.) ‡v Fiction.
650		0	‡a Eccentrics and eccentricities ‡v Fiction.
651		0	‡a Yellowstone River ‡v Fiction.
650		0	‡a Women immigrants ‡v Fiction.
650		0	‡a Young women ‡v Fiction.
650		0	‡a Berrybender family (Fictitious characters) ‡v Fiction.
800	1		‡a McMurtry, Larry. ‡t Berrybender narratives ; ‡v bk. 2.

Standard Numbers. *010* Library of Congress Control Number (LCCN) is the control number for MARC records distributed by the Library of Congress. Can often be found in the Cataloging in Publication (CIP) information on verso page of a book. Can be useful searching number.

020 International Standard Book Number (ISBN) is a unique number assigned to items by publisher. Can be 10 or 13 digit number. Sitka support and training team recommend searching Evergreen and Z39 targets, by both numbers, if present on item, before proceeding to original cataloguing. When cataloguing an item, if both numbers are present, enter both in separate *020* tags.

022 International Standard Serial Number (ISSN) is a unique number assigned to a serial title.

024 Universal Product Code (UPC) is a twelve digit number often assigned to sound recordings and videos.

028 are Publisher Control Numbers, formatted numbers used for sound recordings, printed music, and videorecordings.

Classification Numbers. Evergreen does not display call numbers from the shared MARC record, but the data is useful for searching, matching, and assessing quality of a MARC record. Evergreen uses each library's volume record for local call number display, and will give you the option to auto-fill your number from the MARC record if you want to use that call number as yours.

05X are standard classification (call) numbers that are, or can be, present in a MARC record. The most common are the *050*, which is the Library of Congress Classification Number (LCC), assigned by the Library of Congress, and the *055*, which is the Canadian LCC.

082 is the Dewey Decimal Classification number (DDC).

090 and *092* are tags reserved for a library's local call number. This data is not used by Evergreen for call number display, but you will often see data there from a different library whose system may use the MARC record for call number display.

Title. *245* tag contains all the important title information and General Material Designations (GMD). *245* subfields *a* and *b* are title and sub-title respectively, *245c* contains the statement of responsibility, and *245h* is for approved GMDs. Note, for RDA records, the GMD is no longer used; instead the tags of 336, 337 and 338 are used (see below).

Edition Statement. *25X* tags contain important descriptive information about the item being described. This information includes edition statement, imprint and other publication source information.

Publication Information. *260* tag and subfields *a*, place of publication, *b*, name of publisher, and *c*, year of publication, contain critical publication information and should be as complete as possible. When assessing record matching the *260* tag should always be considered. Note, for RDA records, the 264 tag (with a second indicator of 1) most often is used instead of the 260.

Physical Description of Item. *300* tag is used to physically describe an item as completely as possible.

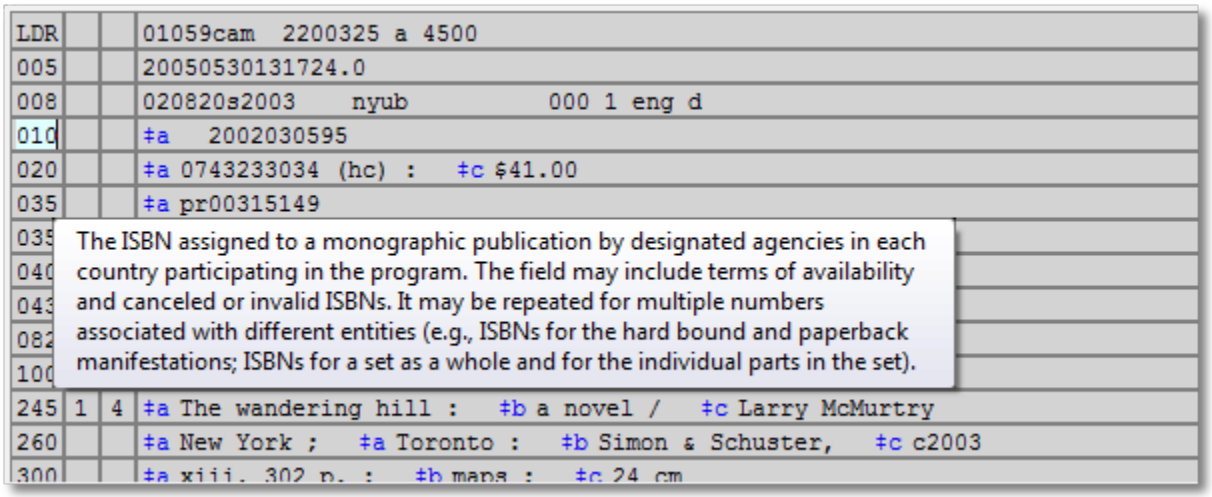
Content, Media and Carrier type (RDA only) . *336, 337, 338* tags are used for RDA records only. The fields of content, media and carrier collectively replace the GMD (245$h). For 336, subfield $a is content term and $2 rdacontent. For subfield 337, $a is media term and $2 is rdamedia. For 338, $a is carrier term and $2 is rdacarrier. See here for appropriate RDA terms.

Series Information. *440* and *490* are used to describe relevant series. *440* was officially made obsolete in 2008, but you will still find it used in records that predate 2008, but for correct, current series cataloguing use the *490* tag.

Notes. *5xx* tags are useful, keyword searchable notes tags, which assist in description and retrieval of items. Use the *500* tag for a note that cannot be placed in any other *5xx* tag as per MARC standards.

Subjects. *6xx* contain subject headings that follow standards for personal, topical, geographical, and genre terms. Use *690* for local, non-standard subject headings.

Hovering your mouse over a MARC tag in *MARC Edit* view presents a short description of the tag and its intended use. You can also hover over a subfield and retrieve textual information about the subfield's intended use.


LDR 01059cam 2200325 a 4500
005 20050530131724.0
008 020820s2003 nyub 000 1 eng d
010 ‡a 2002030595
020 ‡a 0743233034 (hc) : ‡c $41.00
035 ‡a pr00315149
The ISBN assigned to a monographic publication by designated agencies in each country participating in the program. The field may include terms of availability and canceled or invalid ISBNs. It may be repeated for multiple numbers associated with different entities (e.g., ISBNs for the hard bound and paperback manifestations; ISBNs for a set as a whole and for the individual parts in the set).
245 1 4 ‡a The wandering hill : ‡b a novel / ‡c Larry McMurtry
260 ‡a New York ; ‡a Toronto : ‡b Simon & Schuster, ‡c c2003
300 ‡a xiii, 302 p. : ‡b maps ; ‡c 24 cm

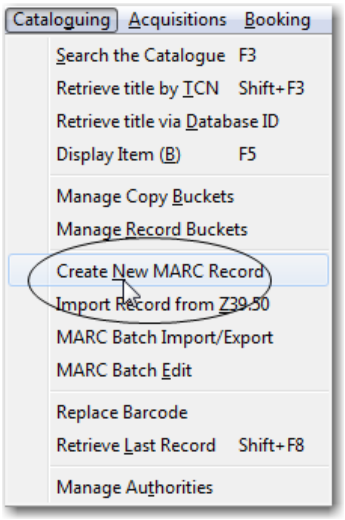
18.4. Creating New MARC Records

It is best practice, and Sitka policy, to search Evergreen, Z39.50 sources, or, in some libraries, a vendor file of MARC records, before using a MARC record template for original cataloguing. You can create new MARC records

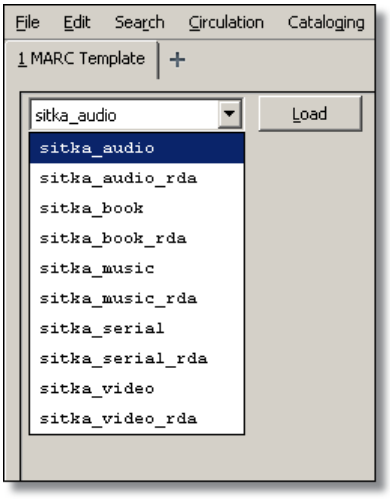
in Evergreen by using MARC templates that exist in Evergreen. Original cataloguing should be done in Evergreen only if there is no record available in any of these previous sources.

For information about working with MARC records see Chapter 19, *Editing and Maintaining MARC records*.

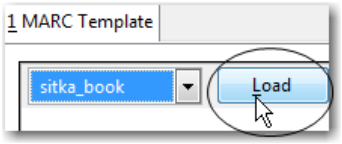
1. To access MARC templates select *Cataloguing* → *Create New Marc Record*.



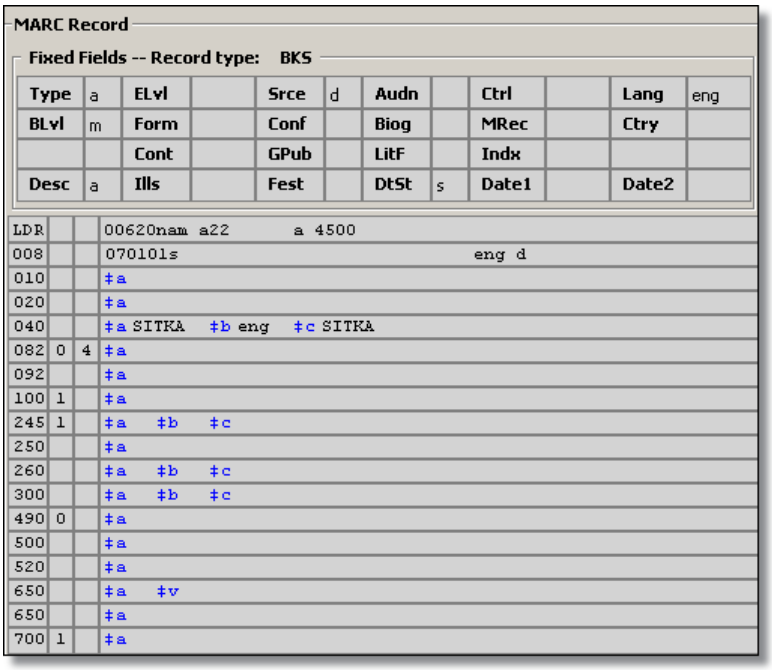
2. The *MARC Template* screen opens. Click into drop down menu field to see available templates. Note you can select a workstation default here. Templates are available for book, music, audio, video and serial and are in both the AACR2 and RDA standards.



3. Select appropriate template and click *Load*.



4. A blank MARC record will load. In this example we have chosen a book template so MARC leader coding is for textual materials.


MARC Record
Fixed Fields -- Record type: BKS
Type a ELvl Srce d Audn Ctrl Lang eng
BLvl m Form Conf Biog MRec Ctry
Cont GPub LitF Indx
Desc a Ills Fest DtSt s Date1 Date2
LDR 00620nam a22 a 4500
008 070101s eng d
010 ‡a
020 ‡a
040 ‡a SITKA ‡b eng ‡c SITKA
082 0 4 ‡a
092 ‡a
100 1 ‡a
245 1 ‡a ‡b ‡c
250 ‡a
260 ‡a ‡b ‡c
300 ‡a ‡b ‡c
490 0 ‡a
500 ‡a
520 ‡a
650 ‡a ‡v
650 ‡a
700 1 ‡a

5. Complete the MARC record as per Sitka policy. You can add and delete tags and subfields as required. See Chapter 19, *Editing and Maintaining MARC records*.

6. Click *Create Record*.

7. The record is created and will open up in your tab in the current default view. If you did not utilize *Fast Item Add*, you may now attach holdings as described in Chapter 14, *Adding Holdings to Existing Records in the Sitka Database*.

18.5. Cataloguing non-physical resources

Ordinary bibliographic records are only visible in the OPAC when holdings records are attached, but it is also possible to catalogue non-physical resources such as websites, online journals, or downloadable audiobooks. The steps below describe how to catalogue a non-physical resource so it appears in OPAC searches.

These instructions are for adding individual records. To upload a batch of records (e.g. from an e-book subscription) please contact Co-op support. For libraries that subscribe to *OverDrive* Co-op support creates and updates bibliographic records automatically.

1. Locate, import, or create a bibliographic record as described in the preceding chapters.

2. Open the record in *MARC Edit* view. Select *Actions for this Record → MARC Edit*.

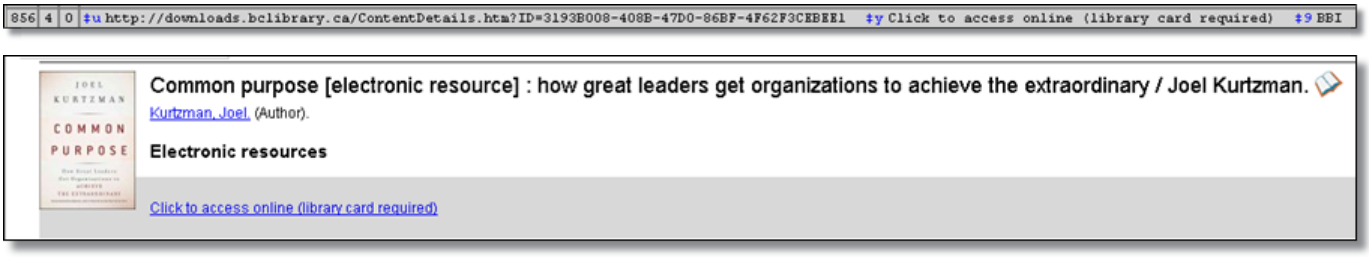
3. Add an 856 tag to the MARC record. Place the cursor in the desired location and press **CTRL**+**Enter** to add an empty row. Enter the tag number (856). You must set the first indicator to 4, and the second indicator to

0 or 1. The indicators cannot be left blank. For information about indicators see http://www.loc.gov/marc/bibliographic/bd856.html.

4. Add applicable subfields from the table below. Press **CTRL**+**D** to add a new subfield (**CTRL**+**I** on MAC OSX).

Subfield code	Description	Example	OPAC display
$u	Required; the URL or link to the resource	*http://www.linktoresource.ca*	Appears as a link in the OPAC display; the link text is the URI unless subfield $y is specified
$y	Optional; a display label for the link	*Click for access*	Appears as the text of the link instead of the URL defined in $u
$z	Optional; a public note providing more information about the resource	*library card and password required*	Appears in parentheses to the right of the link
$9	Required; your library code	BBI	Not displayed in the OPAC but required for the record to be included in searches scoped to your library

5. After the tag 856 is added, the record will be displayed as search result on OPAC for the library in $9. The image below shows a sample 856 tag and the corresponding OPAC display. This record would appear in OPAC searches of the Bowen Island Public Library catalogue (BBI).


856 4 0 ‡u http://downloads.bclibrary.ca/ContentDetails.htm?ID=3193B008-408B-47D0-86BF-4F62F3CEBEE1 ‡y Click to access online (library card required) ‡9 BBI
Common purpose [electronic resource] : how great leaders get organizations to achieve the extraordinary / Joel Kurtzman.
Kurtzman, Joel, (Author).
Electronic resources
Click to access online (library card required)

A separate 856 tag should be added for each library that catalogues the resource. Multi-branch libraries may add a single 856 using the code for the library system (e.g. SCRL, BCREK) if all branches are allowed to access the resource.

Evergreen creates an invisible call number for each tag 856 with subfield 9 with the code in subfield 9 as the owning library. This call number, like a copy record, is used for scoping the seach result to a selected library. To remove a non-physical record from your library's collection, you need to delete your library's tag 856. If your library's tag 856 is the only one, you may delete the MARC record. See Deleting MARC records for more information.

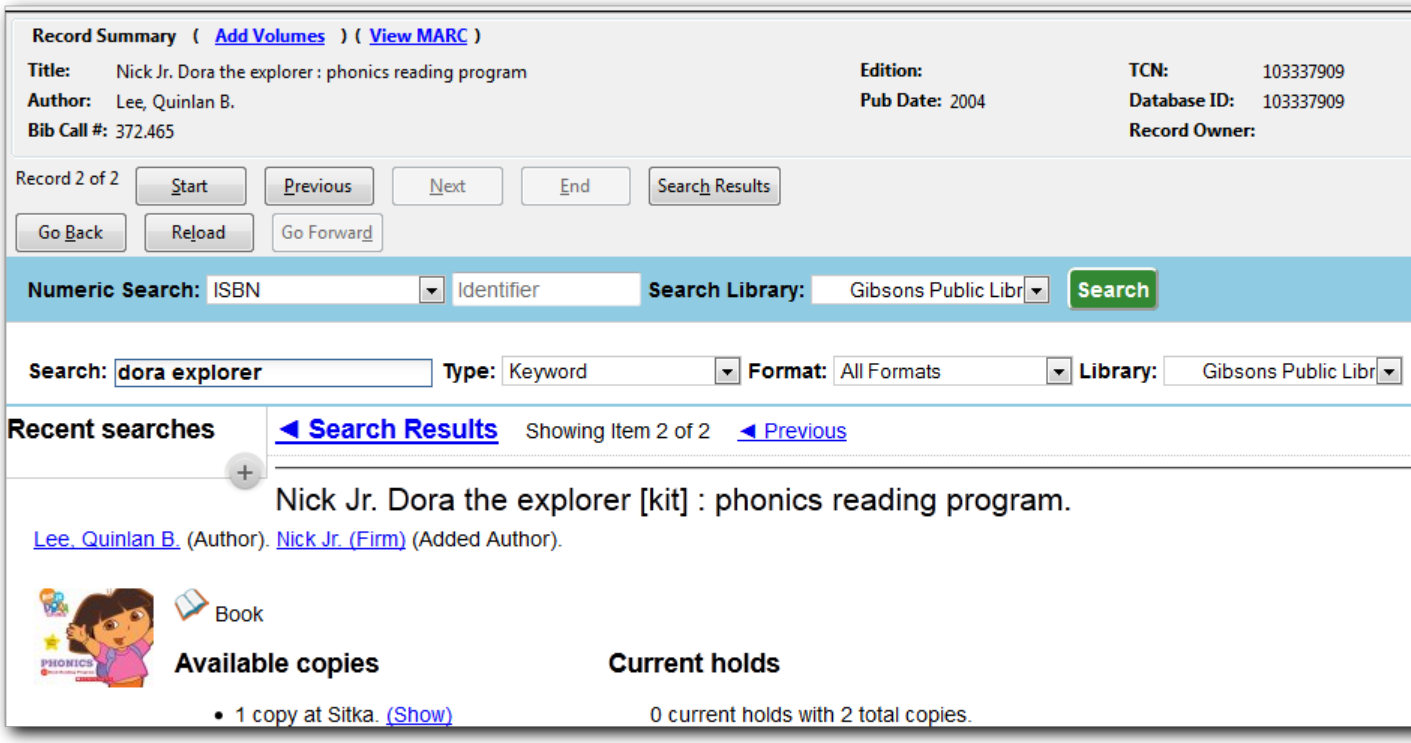
Chapter 19. Editing and Maintaining MARC records

The appropriate title information displayed on OPAC, such as format icons for text, moving pictures and sound relies on correct MARC coding in the leader, and 007 and 008 fields, as do OPAC search filters, such as publication date, item type, or target audience. Bibliographic records matching and de-duplicating also rely on correct MARC coding and consistency in use and content in particular MARC tags, so the ability to edit and manage MARC records is key to maintaining database integrity.

Evergreen allows you to edit MARC tags, sub-fields, and indicators, as well as an easy entry box to edit parts of the leader and 008 fields on a built-in form called *MARC Editor*. Besides, it also provides a text based editor, which allows you to easily add or remove tags, and/or edit the fields. But you need to pay close attention to the position of the tags, indicators and the spacing required to preserve the record structure.

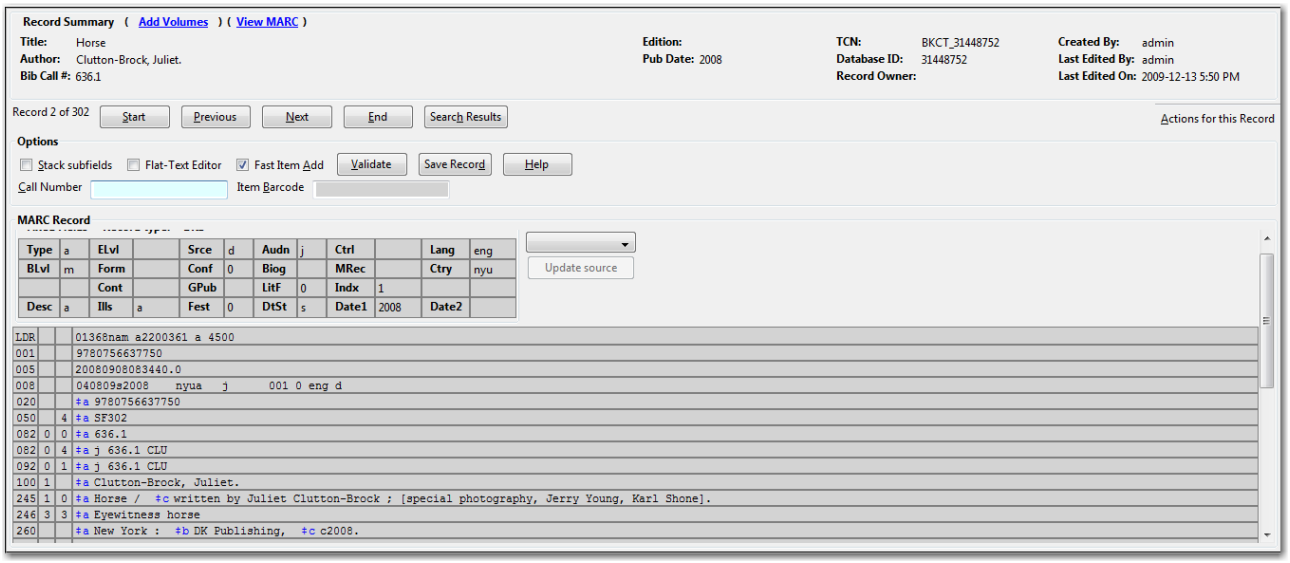
19.1. Editing MARC Records

1. To edit a MARC record, retrieve it on the catalogue. Once record is displayed on Record Details screen, select *Actions for this Record → MARC Edit*.

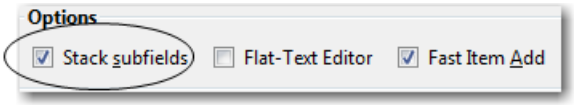


You can set *MARC Edit* as default view by clicking *Actions for this Record → Set bottom interface as Default*. To revert to your default display from a different display, choose *Actions for this Record → Reset Display*.

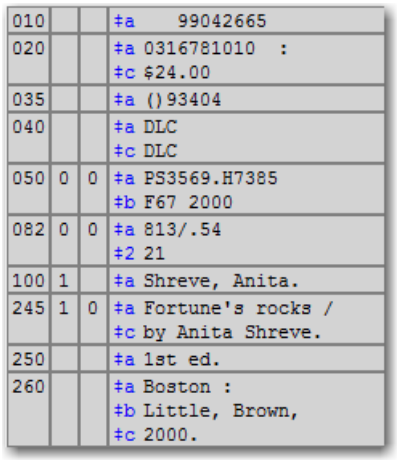
2. MARC record is displayed. Use scroll bar on right to move record up and down on screen.



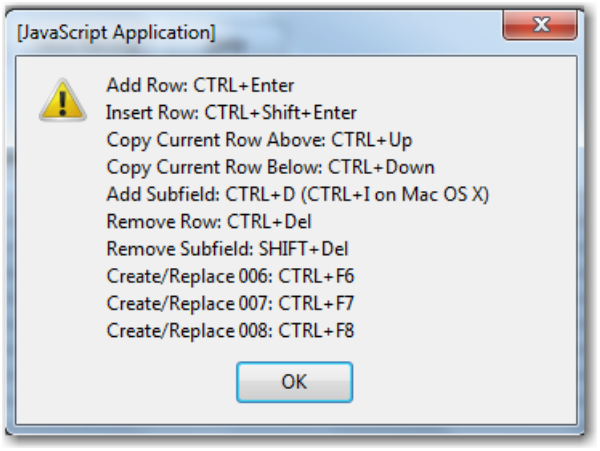
3. Depending on your preference, you can select *Stack subfields* to change the way subfields are displayed.



4. Now the subfields are in separate rows.

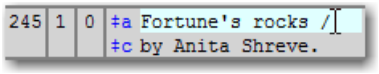


5. To add or remove rows, or replace tags, click the *Help* button to find the keyboard shortcuts. Move the cursor to appropriate positon, then use the keyboard shortcut.



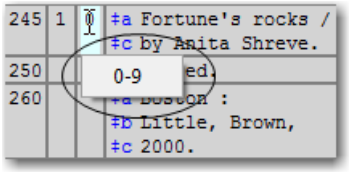
> **Ctrl + F6** and **CTRL + F7** may erase the content in exisiting 006 or 007 tag. It is strongly recommended you add these tags on the *Flat-Text Editor*.

6. To work with the data in a tag simply click or **Tab** into required field.

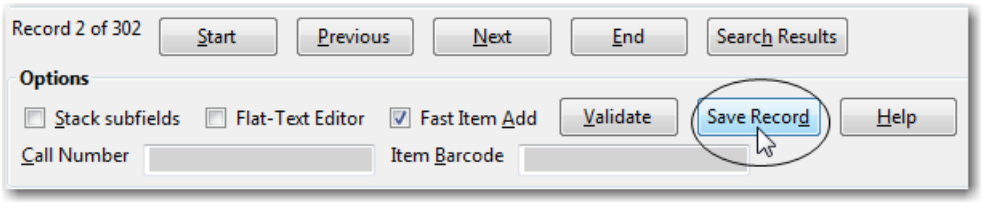


7. To call up the diacritic palette you can use keyboard shortcut: *CTRL S*.

8. To edit indicators, click or **Tab** into required field and right click to view correct indicators and enter appropriate data.



9. Once your edits are complete, click *Save Record*.



To access the *Flat-Text Editor*, select the checkbox in front of it. To switch back to the form editor, de-select it.

> On *Flat-Text Editor*, each line stands for a tag. The tags, indicators and their values are at fixed positions. If there is no value at a position, you will see "\" as a spacing taker. For positionally defined tags, such as 007

or 008, you will see "\" in the field content area, too. You need to replace it with the content you want to put in, when necessary.

19.2. MARC Record Leader and MARC fixed field 008

Parts of the leader and the 008 can be edited in the *MARC Editor* via the fixed field editor box displayed above the MARC record in default MARC Edit view, and at top of record in Flat-Text Editor view. Information about the leader and the 008 can be found on the Library of Congress's MARC Standards page at http://www.loc.gov/marc/

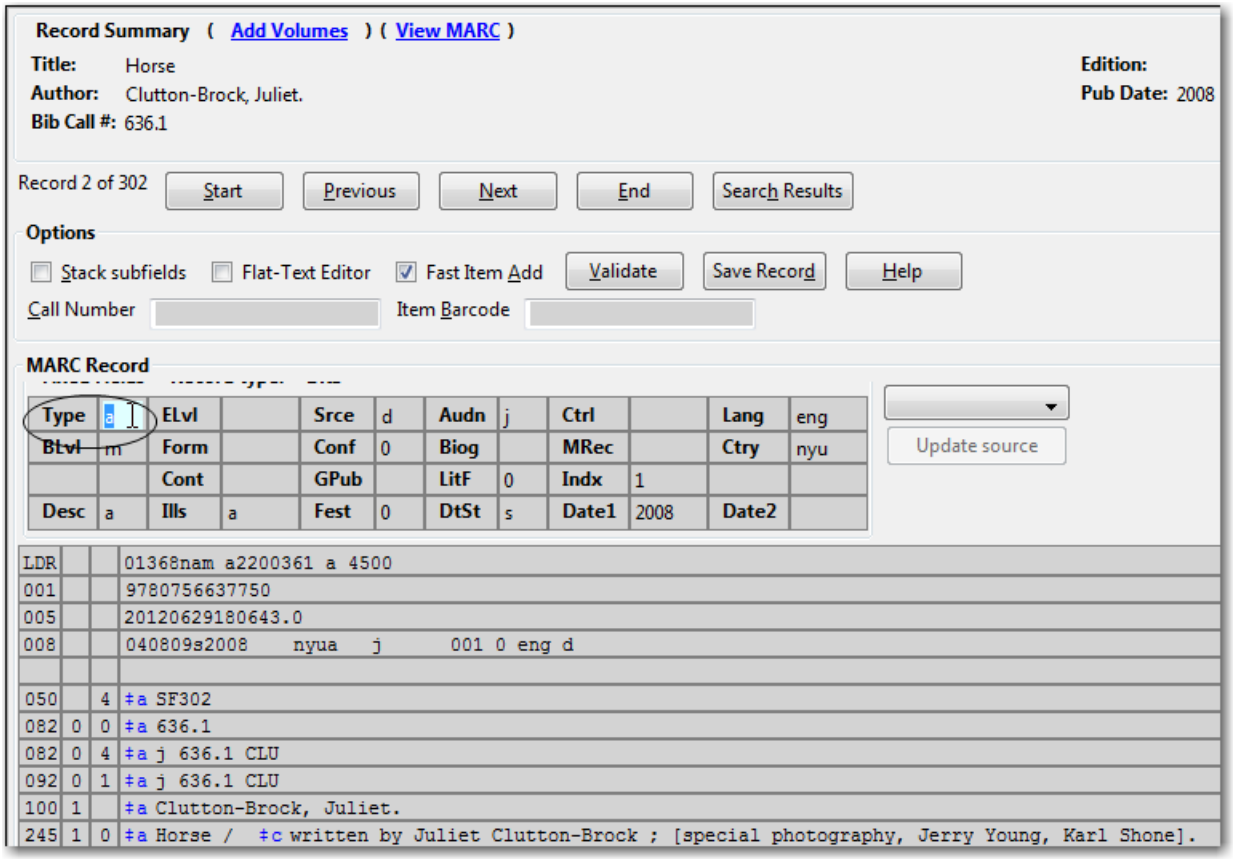
To edit the fixed fields, it is easiest to use default MARC Editor view and click on the name of the field. In Flat-Text Editor view, you must place the cursor at the correct position in the number to edit. When you click on the field name , e.g. Date1, what you type will appear in the box. When you click on the field box itself, you have to backspace your cursor to the very beginning of the box in order to type, because there are space takers in these positionally defined fields. Right-clicking in certain fields such as Type, BLvl, Form, Audn, and Lang will show a drop-down menu of possible choices.

Co-op support advises that Evergreen's fixed field editor requires 4 spaces be input into *ills* box that corresponds to position 18-21 in the 008. Use your space bar to enter spaces required to meet this convention, or your edit to the illustrated box will not be saved in the 008. Once the four spaces are filled, the value will automatically show up in the 008 and will be saved. Contact Sitka support if you have any questions.

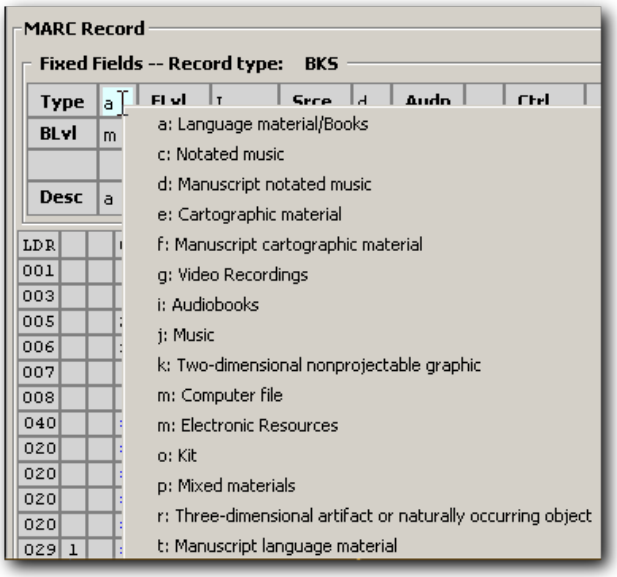
The format filter (eg. Books, E-Books, Audiobooks, Videos etc.) and format icons in the OPAC rely on accurate coding in the Leader, 008 and 007. Please see the format filter and icon specifications in Section 19.3, "Format Filters and Format Icons"

1. Retrieve and display record in *MARC Edit* view as described in Section 19.1, "Editing MARC Records".

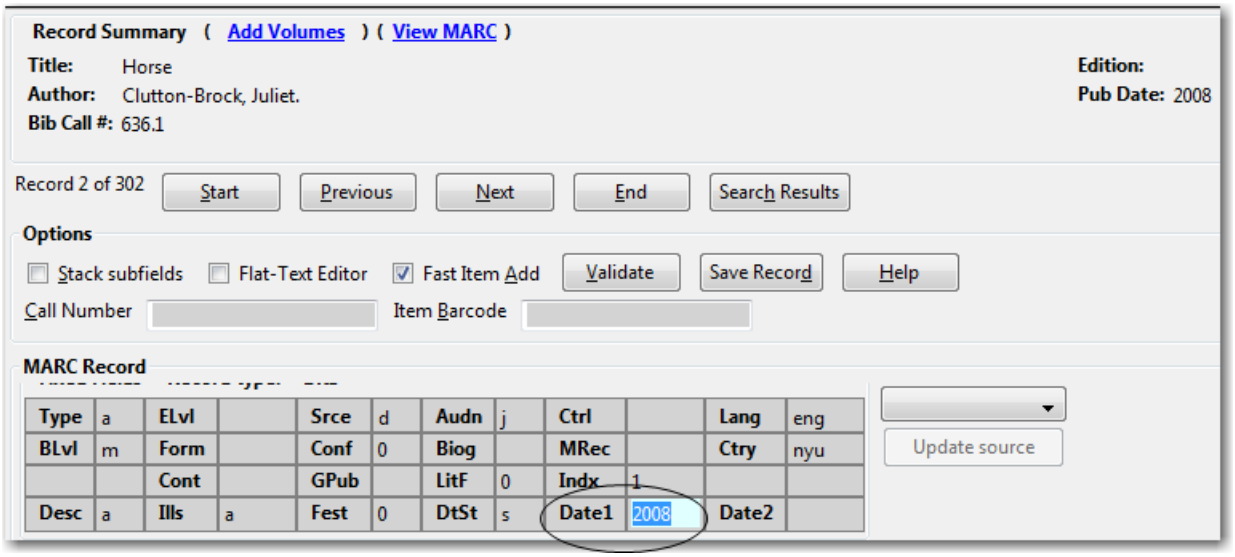
2. Click into any box displayed in the fixed field editor. In this example we are editing the first position, the *Type* or Format box, to describe the format of the resource, textual material, by use of an "*a*".



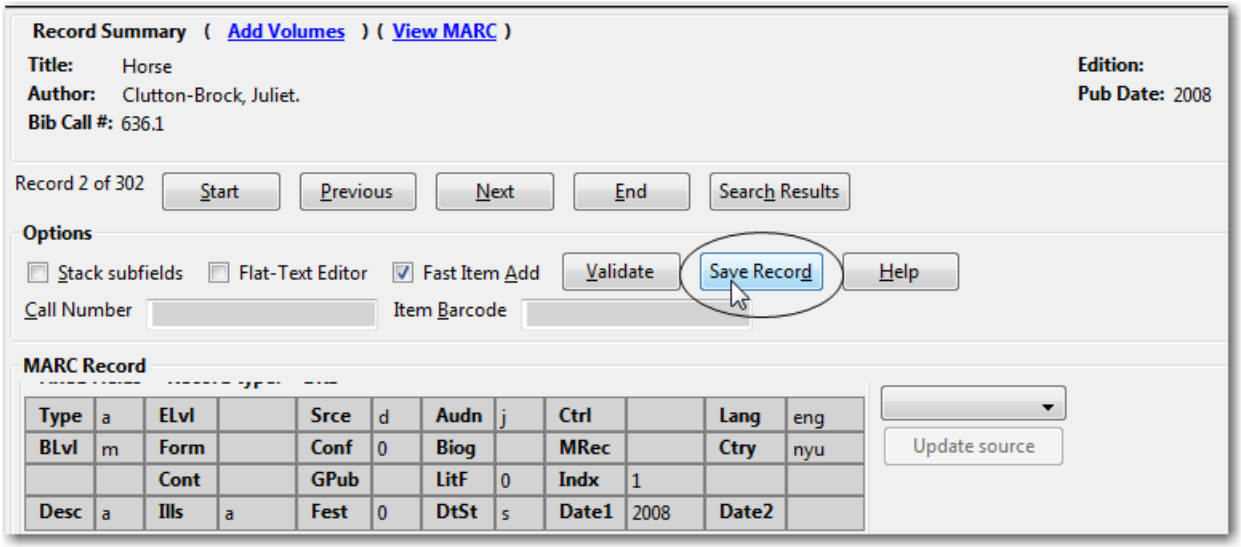
3. Right-clicking in the box will show a list of possible values (eg. BLvl, Type, Form Audn, and Lang). Choose from this list to populate the box.



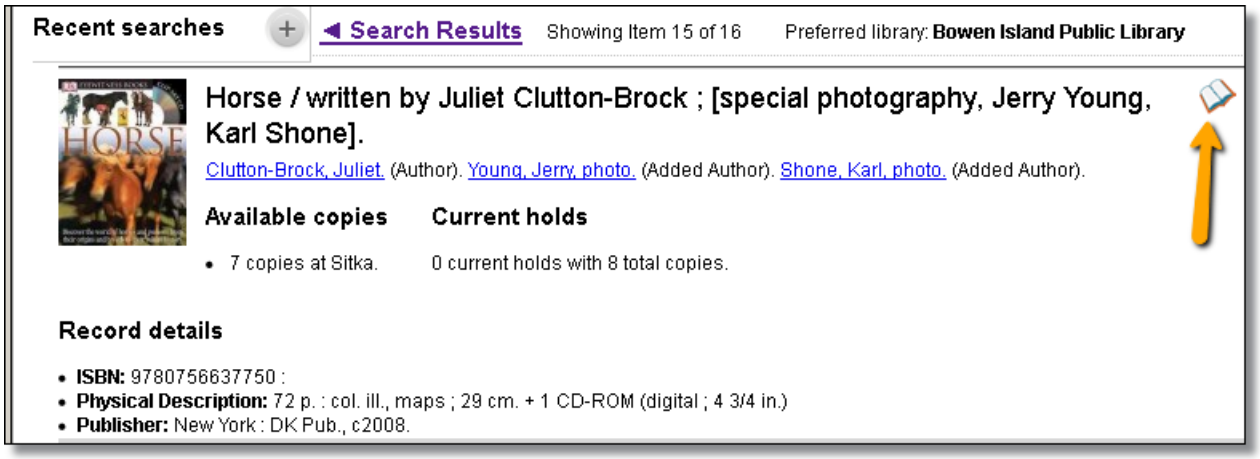
4. You can press the **Tab** key or use the mouse to click through to each field, and can delete and add text as required by backspacing or highlighting existing text and over typing. Here the publication date is being edited; OPAC searches filtered by date rely on correct coding in the 008.



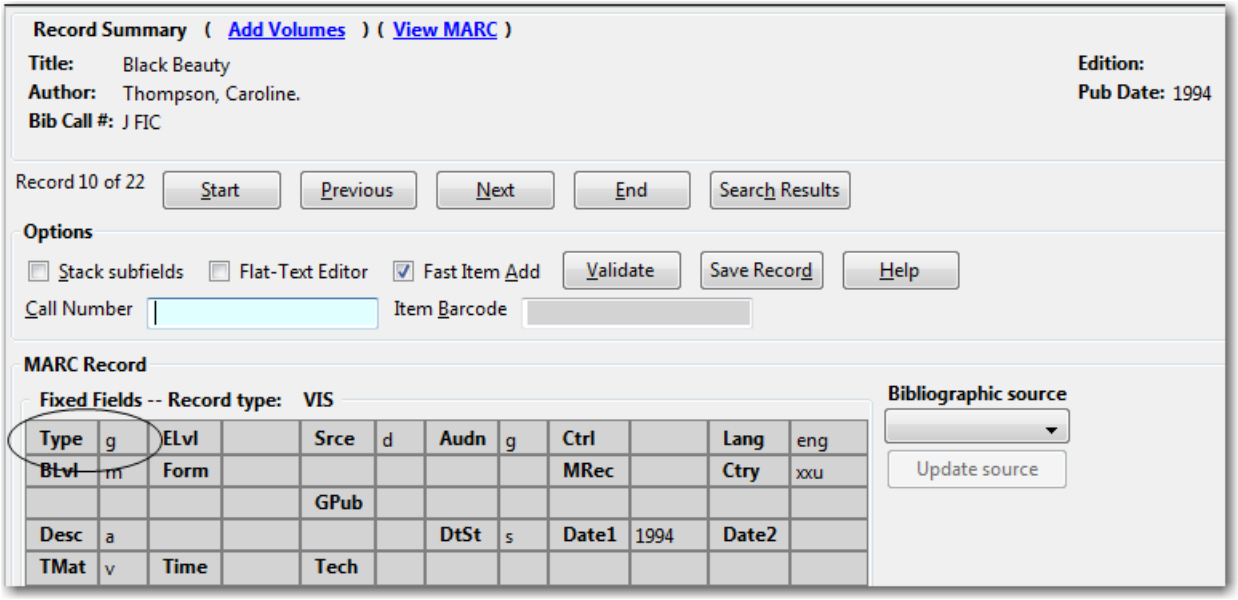
5. Click *Save Record*.



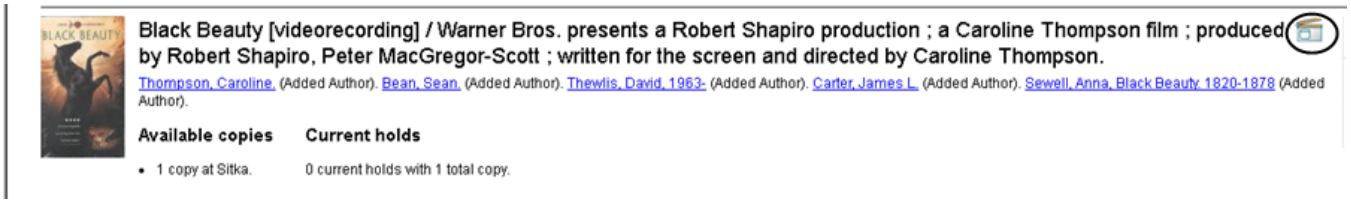
The OPAC icon for textual materials is displayed as in the example below.


Recent searches
Search Results
Showing Item 15 of 16
Preferred library: Bowen Island Public Library
Horse / written by Juliet Clutton-Brock ; [special photography, Jerry Young, Karl Shone].
Clutton-Brock, Juliet. (Author). Young, Jerry, photo. (Added Author). Shone, Karl, photo. (Added Author).
Available copies
Current holds
7 copies at Sitka.
0 current holds with 8 total copies.
Record details
ISBN: 9780756637750 :
Physical Description: 72 p. : col. ill., maps ; 29 cm. + 1 CD-ROM (digital ; 4 3/4 in.)
Publisher: New York : DK Pub., c2008.

A correctly coded moving image record for a video or DVD would look like this in the *MARC Edit* view, with *g* entered in the *Type* field.



The record would display in the catalogue with the movie icon and searches filtered by Item type, video recordings, would retrieve this record.


Black Beauty [videorecording] / Warner Bros. presents a Robert Shapiro production ; a Caroline Thompson film ; produced by Robert Shapiro, Peter MacGregor-Scott ; written for the screen and directed by Caroline Thompson.
Thompson, Caroline. (Added Author). Bean, Sean. (Added Author). Thewlis, David, 1963- (Added Author). Carter, James L. (Added Author). Sewell, Anna, Black Beauty 1820-1878 (Added Author).
Available copies
Current holds
1 copy at Sitka.
0 current holds with 1 total copy.

19.3. Format Filters and Format Icons

Format Filter Groups and Format Icons are configured at the Sitka level.

- item_type (Type) is Leader position 06
- bib_level (BLvl) is Leader position 07
- item_form (Form) is 008 position 23
- vr_format is 007 position 04
- sr_format is 007 position 03

The format filter is used by the OPAC to allow staff and patrons to limit their search by material format. The following table shows the fixed fields associated with each format filter value.

Table 19.1. Format Filters

Label	Fixed Fields
All Audiobooks	item_type(i)
All Books	item_type(a,t) AND bib_level(a,c,d,m) but NOT item_form(a,b,c,f)
Audiobooks (electronic)	item_type(i) AND item_form(o,q,s)
Audiobooks (physical)	item_type(i) AND sr_formt(l,f)
Books (electronic)	item_type(a,t) AND bib_level(a,c,d,m) AND item_form (o,q,s)
Books (large print)	item_type(a,t) AND bib_level(a,c,d,m) AND item_form(d)
Books (physical)	item_type(a,t) AND bib_level(a,c,d,m) and NOT item_form (a,b,c,f,o,q,s)
Kits and Mixed Materials	item_type(o,p,k)
Maps	item_type(e,f)
Music (CD, cassette)	item_type(j)
Music Scores	item_type(c,d)
Pictures	item_type(k)
Serials and Magazines	bib_level(b,s)
Serials and Magazines (electronic)	bib_level(s) and item_form(q,o,s)
Software and Video Games	item_type(m)
Toys, Puzzles and Equipment	item_type(r)
Videos (DVD, VHS, Blu-ray)	item_type(g)

The format icons show in the search results and record display in the catalogue. The following table shows the fixed fields associated with each format icon.

Table 19.2. Format Icons

Label	Fixed Fields
Video (shown if format, eg. vhs, dvd, is unknown)	item_type(g) and NOT vr_format(v,s,b)

Label	Fixed Fields
E-video	item_type(g) and item_form(o, s, q)
DVD	vr_format(v)
VHS	vr_format(b)
Blu-ray	vr_format(s)
Audiobook (shown if format, eg. cassette, disc, is unknown)	item_type(i) and NOT item_form(o,q,s) and NOT sr_format(a,b,c,d,e,l,f)
E-audiobook	item_type(i) and item_form(o,q,s)
CD Audiobook	item_type(i) and sr_format(f)
Cassette audiobook	item_type(i) and sr_format(l)
Phonograph audiobook	item_type(i) and sr_format(a,b,c,d,e)
Book	item_type(a,t) AND bib_level(a,c,d,m) and NOT item_form (a,b,c,d,f,o,q,r,s)
E-Book	item_type(a,t) AND bib_level(a,c,d,m) AND item_form (o,q,s)
Large print book	item_type(a,t) AND bib_level(a,c,d,m) AND item_form(d)
Braille	item_type(a) AND item_form(f)
Kit or mixed material	item_type(o,p)
Map	item_type(e,f)
Music (shown if format, eg. cassette, disc, is unknown)	item_type(j) and NOT sr_format(a,b,c,d,e,f,l)
Phonograph music	item_type(j) AND sr_format(a,b,c,d,e)
CD music	item_type(j) AND sr_format(f)
Cassette music	item_type(j) AND sr_format(l)
E-music	item_type(j) AND item_form(o, s, q)
Music score	item_type(c,d)
Picture	item_type(k)
Serial or magazine	bib_level(b,s)
Software or video game	item_type(m)
Toys, puzzles or equipment	item_type(r)
Picture	item_type(k)
Microform	item_form(a,b,c)

19.4. Merging Bibliographic Records in Evergreen

This lesson will demonstrate merging bibliographic records in the catalogue. A common application for this functionality is to replace brief records with full records. You will only need to do this if you are unable to locate a full record in a Z39 target and therefore cannot overlay the brief record on import, or you need to preserve the local

information in the record to be overlaid and want to import the record first and copy over the local information on the merging screen. The full record may have been added to the database by another Sitka cataloguer, or you may have created a MARC record in the database yourself.

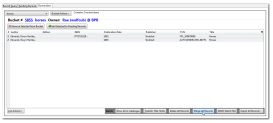
Any volume and copy records or holds associated with the brief record will be transferred to the full record upon merging.

1. Create a bucket for the records you wish to merge (see Section 20.1, “Creating Record Buckets” for detailed instructions). In the examples below the bucket is named *Horse Books*.

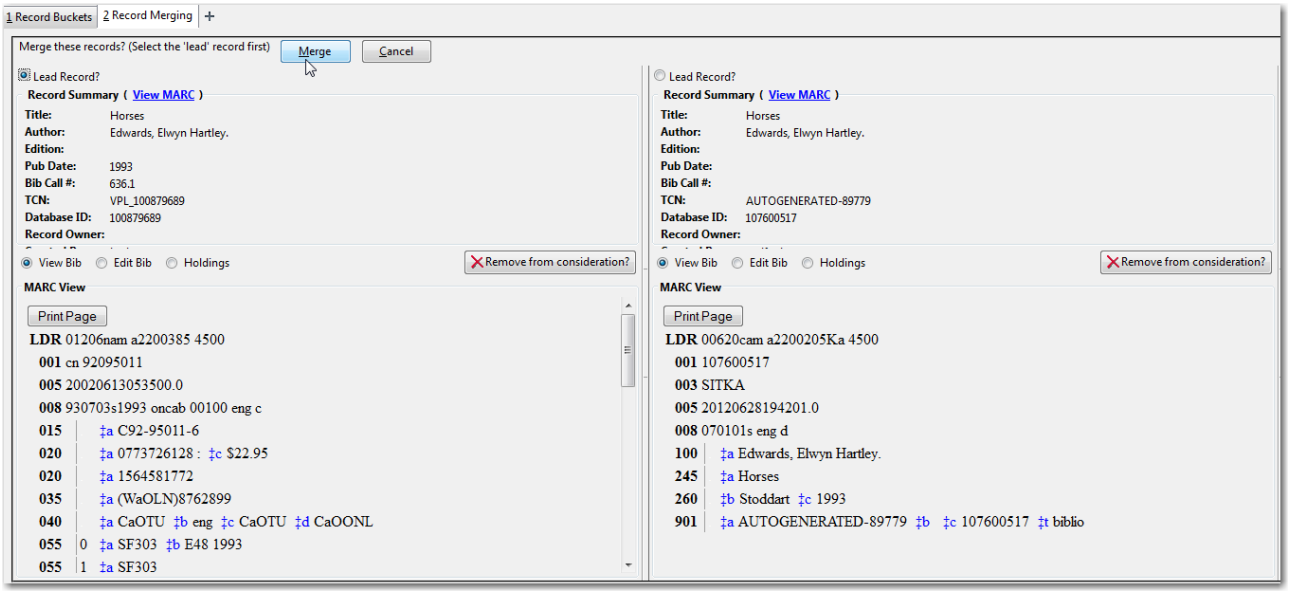
2. Identify records to be merged and add them to the bucket (see Section 20.2, “Adding Records to Buckets”.

3. Retrieve the bucket by selecting *Edit* → *Record Buckets* or *Cataloguing* → *Manage Record Buckets*.

4. Click *Merge All Records*.



5. Select one record as the *Lead Record*, which would be the better quality full record, and click *Merge*. In this example record # 100879689 is the Lead Record. Note that if you wish to edit the lead record, e.g. copying over local information from the non-lead record, you may select the *Edit Bib* radio button to do it before clicking *Merge*.



The brief record has been subsumed by the full record, and all of the volumes, copies and holds associated with the brief record are now attached to the full record.

Note some of the options in the record merge screen. You can remove a record from consideration here, view or edit the bibliographic record, and view attached holdings. If the non-lead record has tags for local information, such as 590 and 690, you need to add them to the lead record before merging.

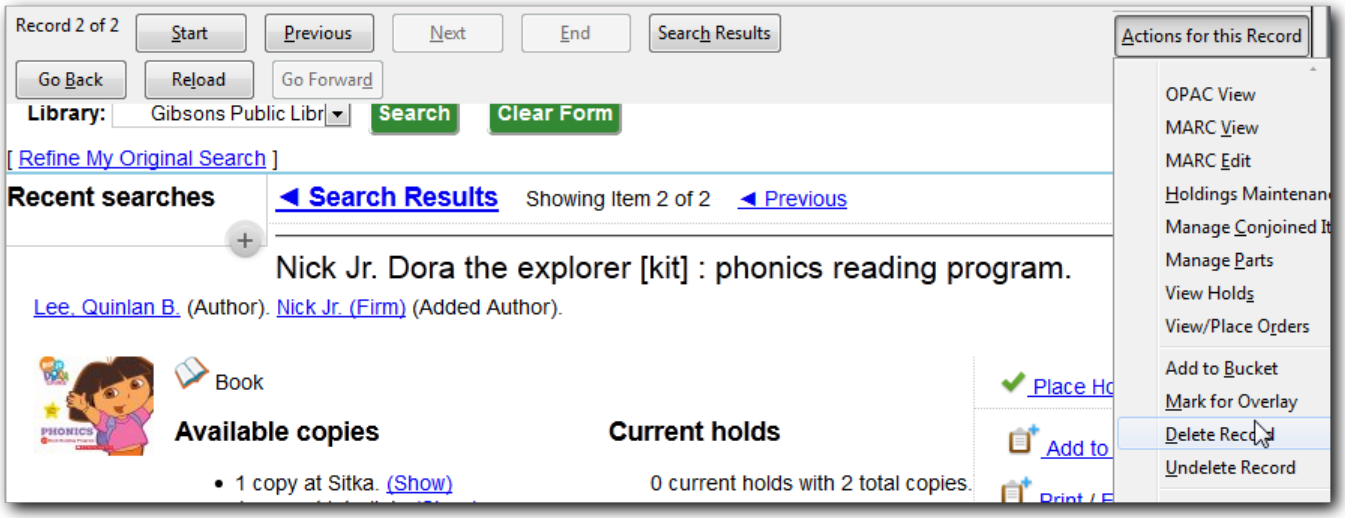
19.5. Deleting MARC records (bibliographic or title records)

Due to cascading record deletion on sole copies, you may find you do not need to delete MARC records very often, as Evergreen does this for you.

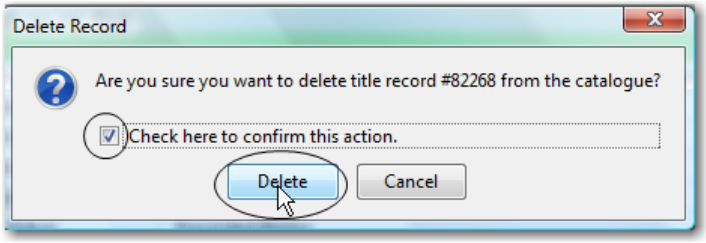
Remember that Sitka has Evergreen configured to always delete a MARC record when the only copy attached to it is deleted and you can only delete a MARC record if there are no holdings attached to it in the database. This may happen if you have imported a new MARC record in error, and have not attached any holdings to it, or some other error or conversion circumstance that leaves a MARC record in the database with no holdings attached.

You can delete a MARC record directly from the catalogue view.

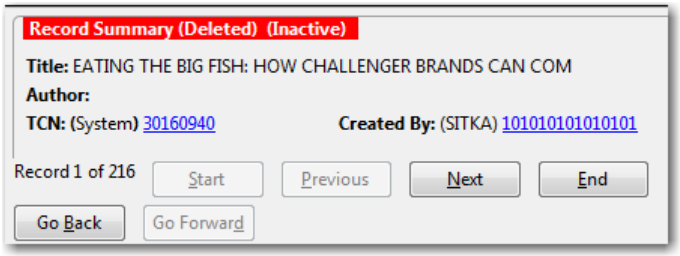
1. Find the record in the catalogue and go to Record Details, and click on *Actions for this Record → Delete Record*.



2. Confirm the deletion by checking box as indicated then click *Delete*

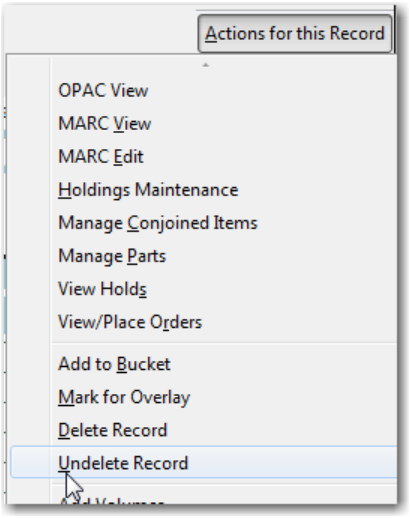

Delete Record
Are you sure you want to delete title record #82268 from the catalogue?
Check here to confirm this action.
Delete
Cancel

3. Click *OK* when prompted. Record is now deleted and inactive and only retrievable by a TCN (title control number) search or bibliographic record id (presented at deletion confirmation prompt).



You may also delete MARC records from a Record Bucket.

If you delete a MARC record in error, you may immediately undelete it on screen by selecting *Actions for this Record → Undelete Record.*

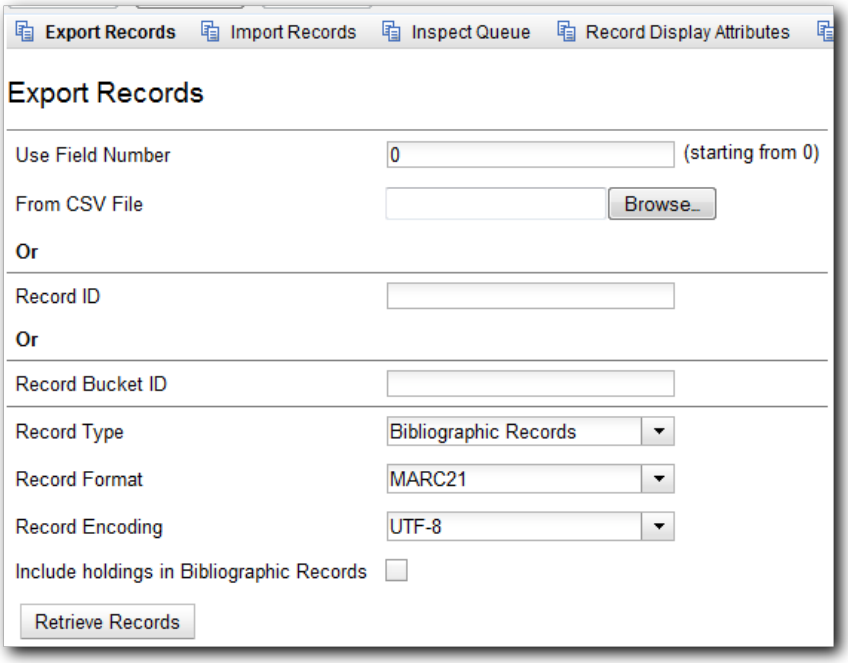


19.6. Exporting MARC Records

There are times when you may want to export MARC records from Evergreen. Evergreen allows you to do so via the *Record Bucket* and the *Batch MARC Import/Export* interface. When you use the latter, you may include the holdings information in the MARC records. Based on Sitka's configuration, the holdings information will be in tag 852, including the copy's circulating library, shelving location, barcode, call number, status, and others saved in the copy record.

MARC records can be exported from Evergreen in selected MARC and non-MARC format: MARC21, UNIMARC, MARCXML or Evergreen Record Entry. You need to choose one from the dropdown list. The exported records can be coded in either UTF-8 or MARC8.

To export MARC records on *Batch MARC Import/Export* interface, click *Cataloguing → MARC Batch Import/ Export*. The default screen is *Import Records*. Click *Export Records* tab to open the export interface.



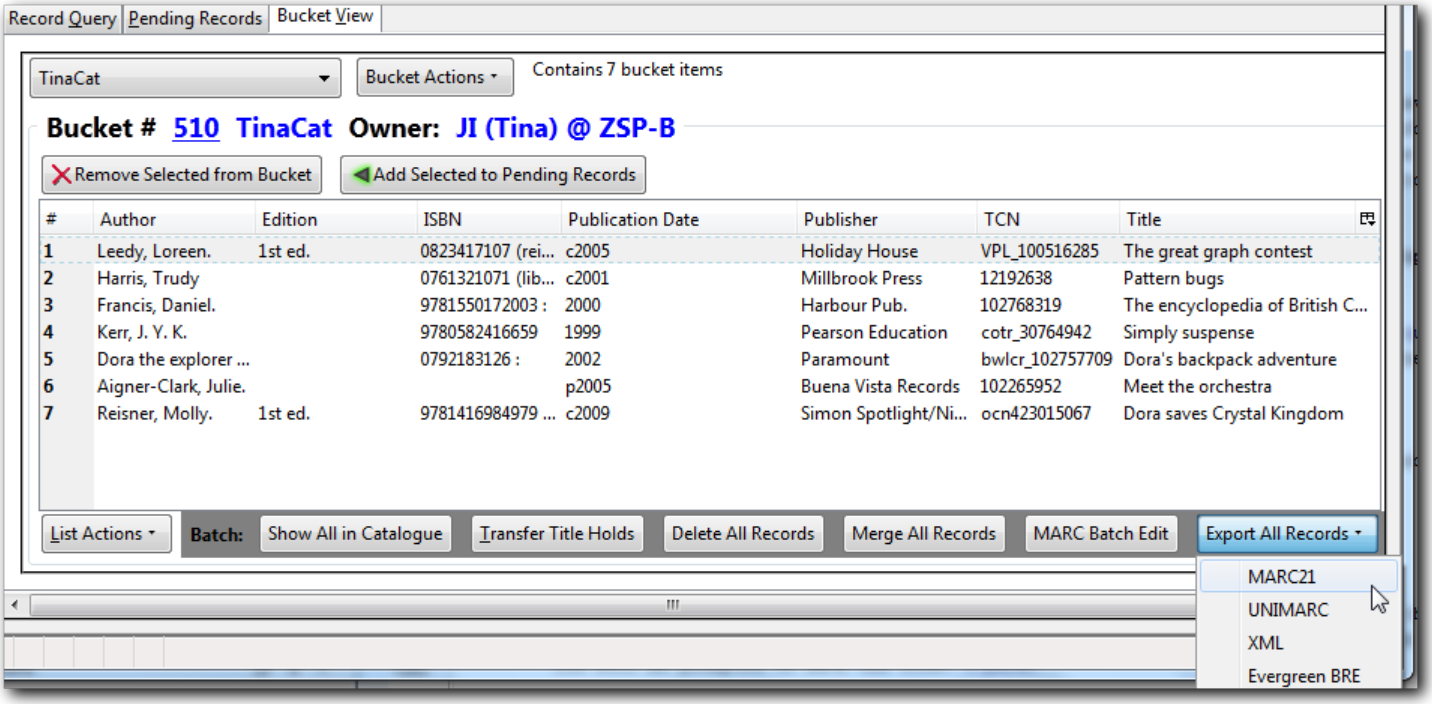
If you want to export more than one record at a time, the records need to be saved in a Record Bucket or their IDs saved in a CSV file. If the CSV file contains other information than just record ids, specify which column is the record id by filling it into the *Use Field Number* box. Note that the field number starts from 0. If the second column in the CSV file is record id, the field number is 1.

If you export one record only, you may type in the record ID directly on the Export interface.

Once you have completed the above form, click the *Retrieve Records* button at the bottom. You will be prompted to browse the records, and then save them, or save them directly into a file.

Holding records can be exported in tag 852, but this includes all item records across the Sitka consortium, not just your library's holdings.

To export MARC records from *Record Bucket*, go to *Edit* → *Record Bucket*. Retrieve the bucket containing the records that you wish to export. Click *Export All Records* to select the exported record format. You will be prompted to save the file.


Record Query
Pending Records
Bucket View
TinaCat
Bucket Actions
Contains 7 bucket items
Bucket # 510 TinaCat Owner: JI (Tina) @ ZSP-B
Remove Selected from Bucket
Add Selected to Pending Records
Author Edition ISBN Publication Date Publisher TCN Title
1 Leedy, Loreen. 1st ed. 0823417107 (rei... c2005 Holiday House VPL_100516285 The great graph contest
2 Harris, Trudy 0761321071 (lib... c2001 Millbrook Press 12192638 Pattern bugs
3 Francis, Daniel. 9781550172003 : 2000 Harbour Pub. 102768319 The encyclopedia of British C...
4 Kerr, J. Y. K. 9780582416659 1999 Pearson Education cotr_30764942 Simply suspense
5 Dora the explorer ... 0792183126 : 2002 Paramount bwlcr_102757709 Dora's backpack adventure
6 Aigner-Clark, Julie. p2005 Buena Vista Records 102265952 Meet the orchestra
7 Reisner, Molly. 1st ed. 9781416984979 ... c2009 Simon Spotlight/Ni... ocn423015067 Dora saves Crystal Kingdom
List Actions
Batch:
Show All in Catalogue
Transfer Title Holds
Delete All Records
Merge All Records
MARC Batch Edit
Export All Records
MARC21
UNIMARC
XML
Evergreen BRE

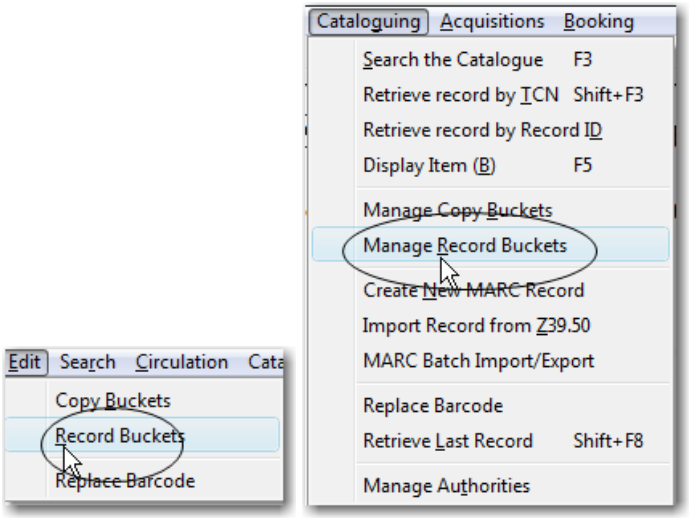
Chapter 20. Record Buckets

This part of the lesson will demonstrate how to create and manage bibliographic record buckets. The steps used for copy buckets are similar. It is very important when working with buckets to ensure you are working with the correct type of record for the corresponding bucket. You cannot add copy records to bibliographic record buckets and vice versa.

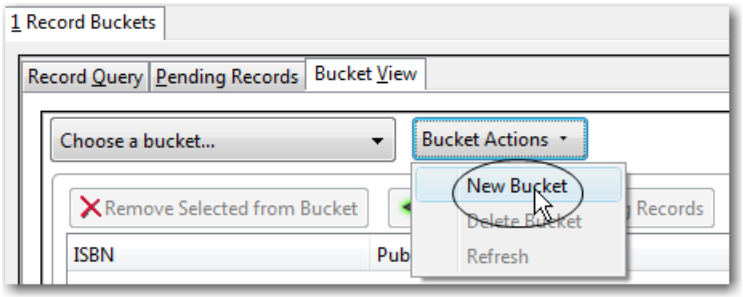
20.1. Creating Record Buckets

There are two ways to create a bucket. You can either create a bucket first, without accessing any records, or you can access a record and choose to create the bucket from that view. We will demonstrate both methods here, beginning with creating a bucket independent of a record.

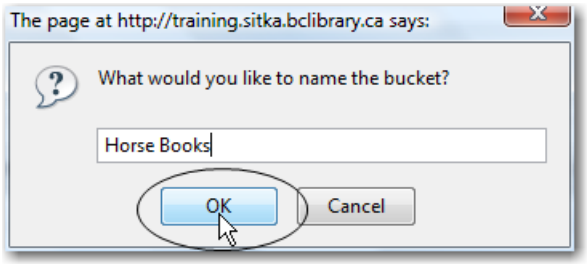
1. Select *Edit* → *Record Buckets* or *Cataloguing* → *Manage Record Buckets*.



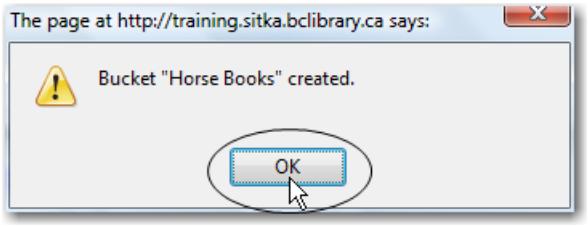
2. Select *New Bucket.*



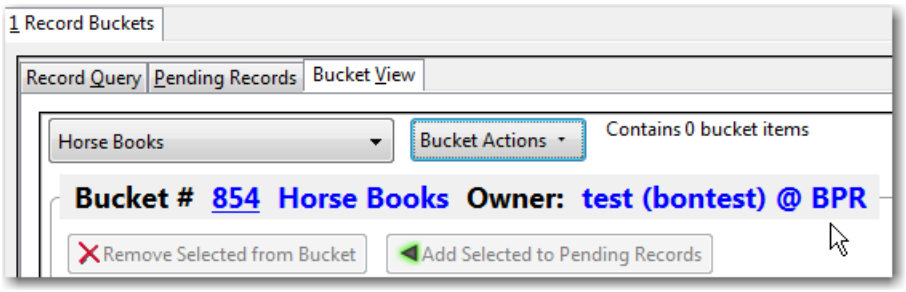
3. Name the bucket and click *OK*.



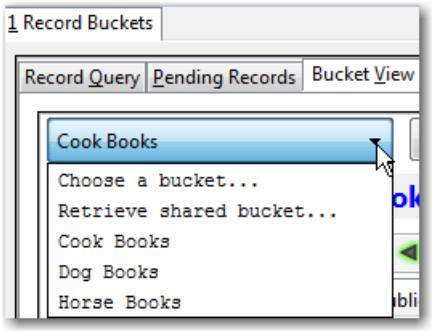
4. Click *OK* on the resulting confirmation dialogue.



5. The *Bucket View* has changed to display your new bucket as the active bucket. Note the bucket is numbered, and creating owner identified.

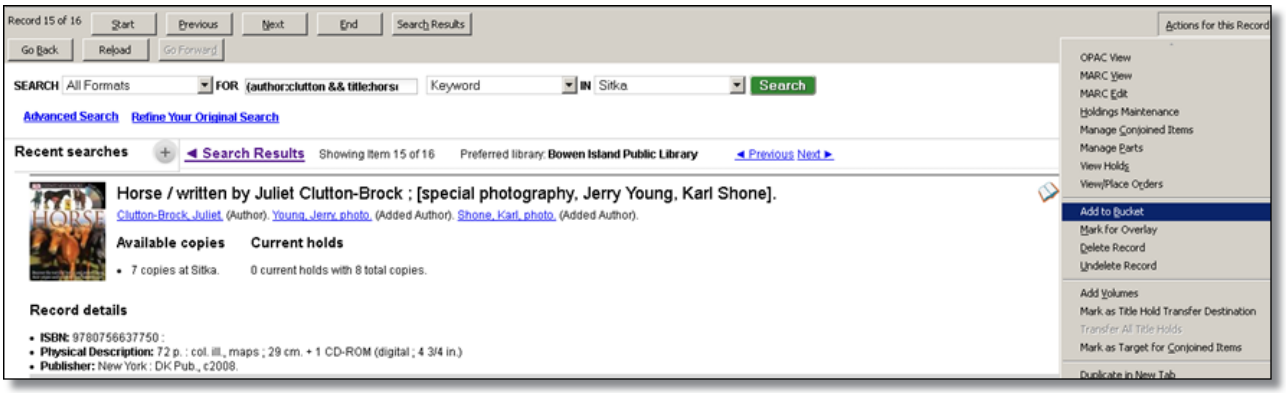


6. Note that all buckets created by this login are available in the drop down menu.

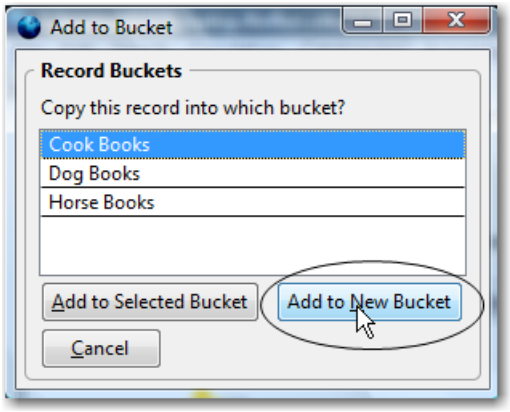


The last option under *Bucket Actions* is *Locate Z39.50 Matches*. This feature allows you to search for replacement records via Z39.50 for all records in a bucket. If you are interested in this feature, please contact Co-op support.

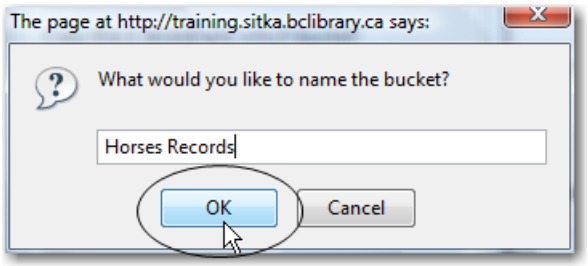
7. You can also create a bucket from within a record. Search for, retrieve, and display any bibliographic record, then choose *Actions for this Record → Add to Bucket*.



8. Select *Add to New Bucket*.



9. Name the bucket and click *OK*. The results are the same as creating a bucket using the steps above, with the difference being the new bucket created on the fly now has a record in it.

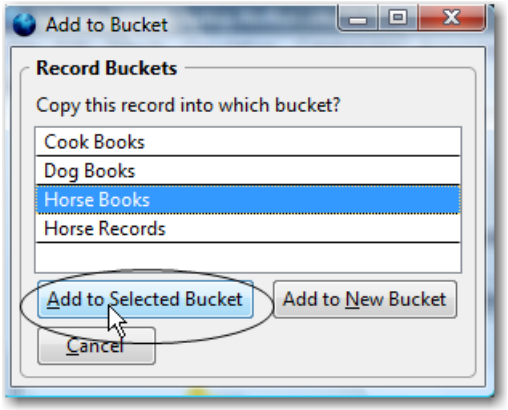


20.2. Adding Records to Buckets

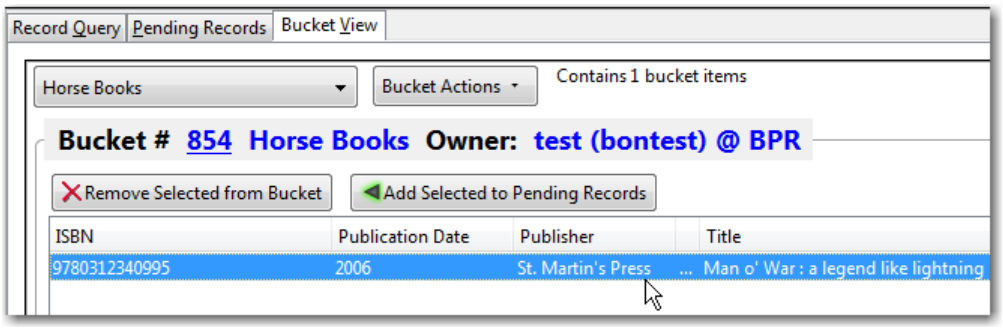
Now that you have created a bucket, you can begin to add records.

1. Search for, retrieve, and display any bibliographic record, then choose *Actions for this Record → Add to Bucket*.

2. Select the appropriate bucket and click *Add to Selected Bucket*.



3. If required, go back to the *Record Bucket* tab to confirm the action. You will see your bucket now contains the record.



4. You can continue adding records as required.

You may also add bibliographic records to a bucket via the **F5** *Item Status* screen. Scan item barcodes into the screen, select all, choose *Actions for Cataloguers* or *Actions for Selected Items* and choose *Add to Record Bucket.*This will place all the bibliobgraphic records associated with the item records you scanned into a bucket.

Note the column picker allows you to manipulate data display within the bucket.

Clicking on *List Actions* > *Save List CSV to File* exports all column headers and displayed data to your computer in a text file format. This can be useful for creating bibliographies or similar lists.

Clicking on *List Actions* > *Print List CSV* prints column headers and displayed data.

Part IV. OPAC

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Chapter 21. Search the catalogue

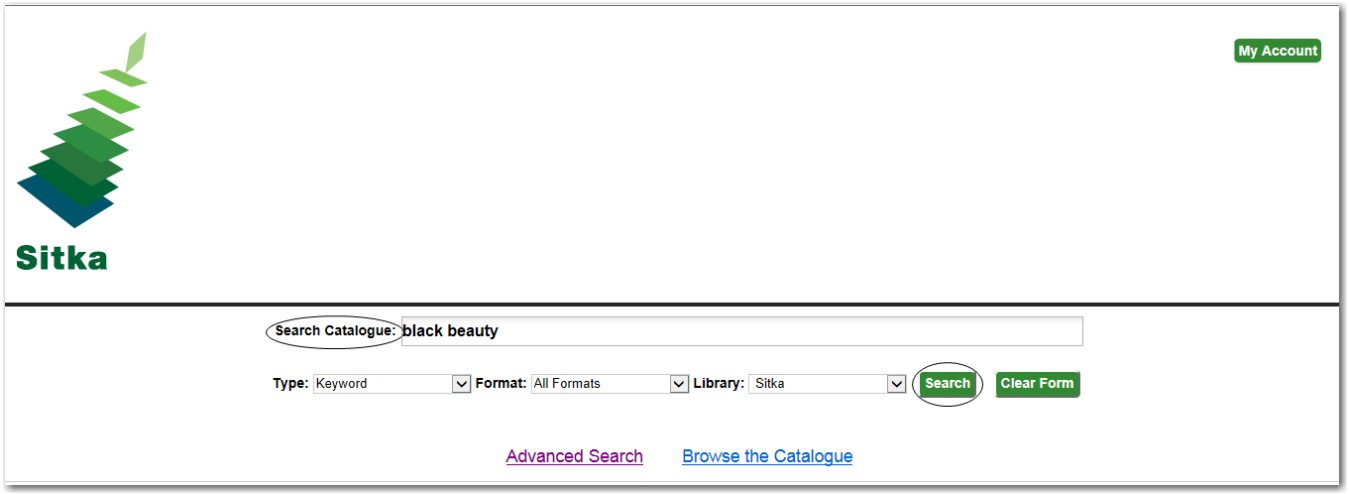
The Sitka catalogue can be accessed through the computers at your local library or online from any location via the Internet.

For online access, visit your library's website and follow the link to their online catalogue, or go to http://catalogue.libraries.coop for the BC Libraries Cooperative portal to the catalogue.

21.1. Basic Search

The homepage for the Sitka catalogue allows you to search for books and other items at your library or libraries.

The homepage contains a single search box for you to enter a search term.



You can select to search by:

- **Keyword**—finds the terms you enter anywhere in the entire record for an item, including title, author, subject, and other information.
- **Title**—finds the terms you enter in the title of an item.
- **Journal Title**—finds the terms you enter in the title of a serial bibliographic record.
- **Author**—finds the terms you enter in the author of an item.
- **Subject**—finds the terms you enter in the subject of an item. Subjects are categories assigned to items according to a system such as the Library of Congress Subject Headings.
- **Series**—finds the terms you enter in the title of a multi-part series.

Formats

You can limit your search by format. Some of the more popular formats in the list are the following:

- For **Books**, you can choose All Books, which includes regular print books, large print books, audiobooks and e-books OR you can choose the individual format. The individual choices are: Books (physical), Books (large print), E-Books, Audiobooks (physical) or E-Audiobooks. Note that Audiobooks (physical) are books read aloud on CDs or other physical media, whereas E-Audiobooks are books read aloud available online.

- **Videos** will search all videos formats such as DVD, VHS and Blu-ray.

- **Music** will search music on CD or other media.

- **Serials/Magazines** will search on magazine, serial, or journal titles only.

- **Software/Video Games** will search on games, databases, and other software.

Libraries

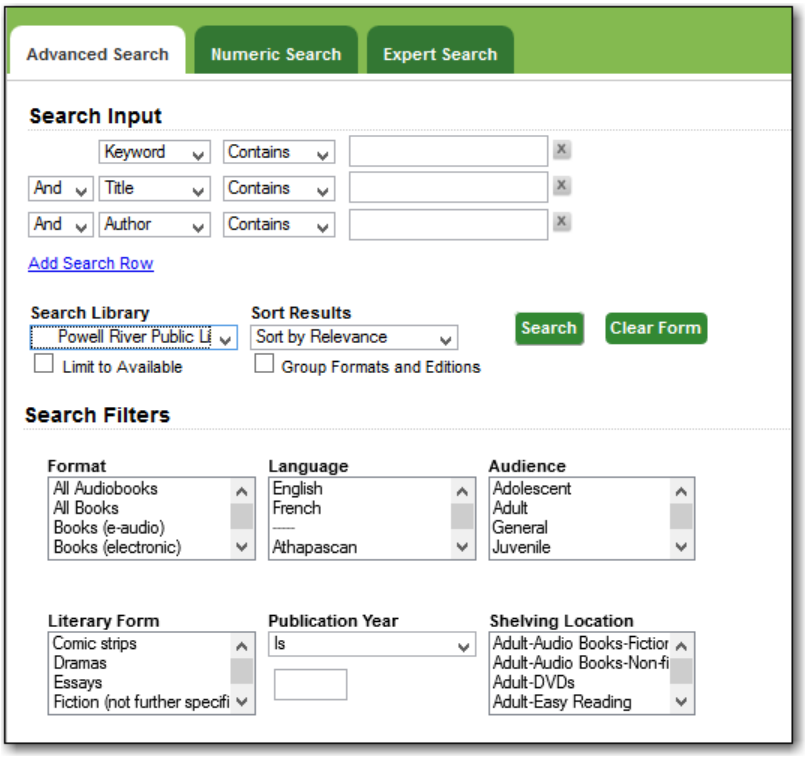
If you are using a catalogue in a library or accessing a library's online catalogue from its homepage, the search will return items for your local library. If your library has multiple branches, the result will display items available at your branch and all branches of your library system separately. If your library participates in Interlibrary Connect the results may display items available across your federation.

If you access the catalogue from http://catalogue.libraries.coop, you may scope your search result to Sitka, regional libraries, a library system or a library branch by clicking into the *In* box on the catalogue homepage and selecting the target library from the drop down list. You will then be able to see how many copies of a title are available in all Sitka member libraries across Sitka, or within the regional libraries, or within the library system, or within the branch, depending on search scope selected.

21.2. Advanced Search

You can access the Advanced Search by clicking *Advanced Search* on the Sitka catalogue homepage or search results screen.

The available search options are the same as on the homepage, but you may use one or more of them simultaneously. If you want to combine more than three search options, use *Add Search Row* button to add more search input rows. .



Sort Criteria

By default, the search results are in order of greatest to least relevance. See OPAC Order of Results. In the sort criteria box you may select to order the search results by relevance, title, author, or publication date.

Group Formats and Editions

This checkbox is at the bottom line of Sort Criteria. When it is checked, all formats and editions of the same title are grouped as one result. For example, the DVD and the first and second print editions of *Harry Potter and the Chamber of Secrets* will appear together.

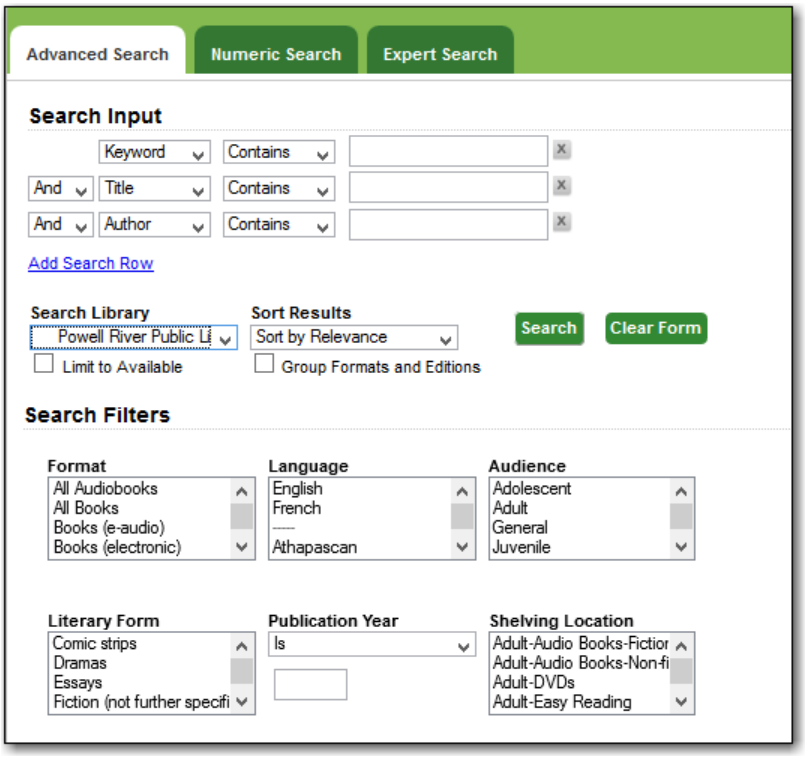
Search Library

The current search library is displayed under the *Search Library* box. If you accessed the catalogue from your library's homepage or catalogue URL, the default search library is your library. The search returns results for your local library only. If your library system has multiple branches, use the *Search Library* box to select different branches or the whole library system.

If you access the catalogue from http://catalogue.libraries.coop, your default search library is Sitka or the library you have selected on the homepage. You may use the *Search Library* box to select a different library or regional libraries, or all libraries in Sitka to search.

Shelving Location

Select a *Search Library* to filter by Shelving Location. *Shelving Locations* that are not *OPAC visible* will not be displayed.



Limit to Available

This checkbox is just below the *Search Library* box. Select *Limit to Available* to limit by item's current circulation status. Titles without available items in the selected search library will not be displayed.

Search Filter

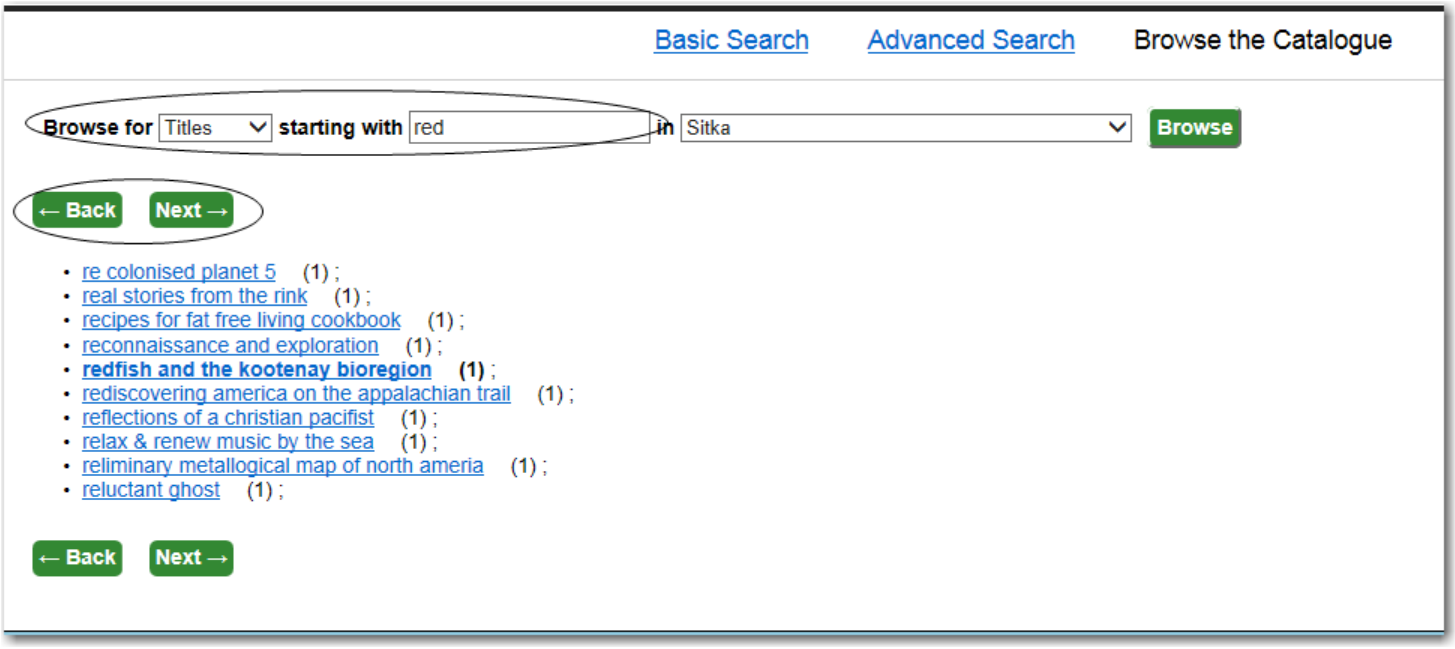
You can filter your search by *Format, Language, Audience,Literary Form, Publication Year,* and *Shelving Location.* Publication year is inclusive. For example, if you set *Publication Year* Between 2005 and 2007, your result items will be published in 2005, 2006 and 2007.

Numeric Search

If you have numeric details on the exact item you wish to search for, use the *Numeric Search* option from search tabs across the top of the screen. Use the drop-down menu to search by *ISBN, ISSN, Call Number, LCCN, TCN, or Item Barcode*. Enter the information and click *Search.*

Browse the Catalogue

Patrons and staff can browse records in the OPAC. The following fields are browsable: title, author, subject, and series. The browse is constructed by the term *starting with*. To browse the catalogue, click *Browse the Catalogue*, select a field to browse, and enter a keyword and click *Browse*. A list of results will appear. Click on the bolded text to view bibliographic records. You may move backward or forward through your results by clicking on *Back* or *Next.* Note your results are alphabetical, with results prior to your search term, and after, listed.


Basic Search
Advanced Search
Browse the Catalogue
Browse for Titles starting with red in Sitka Browse
← Back Next →
re colonised planet 5 (1) ;
real stories from the rink (1) ;
recipes for fat free living cookbook (1) ;
reconnaissance and exploration (1) ;
redfish and the kootenay bioregion (1) ;
rediscovering america on the appalachian trail (1) ;
reflections of a christian pacifist (1) ;
relax & renew music by the sea (1) ;
reliminary metallogical map of north ameria (1) ;
reluctant ghost (1) ;
← Back Next →

MARC Expert Search

If you are familiar with the MARC system, you may search by tag in the *Expert Search* option from search tabs across top of the screen. Enter the three-digit tag number, the subfield (if relevant), and the value or text that corresponds to the tag. For example, to search by publisher name, enter 260 b Random House. To search several tags simultaneously, use the *Add Row* option. Click *Search* to run the search.

21.3. Search Tips

You do not need to enter an author's last name first, nor do you need an exact title or subject heading as all searches are keyword search. Evergreen is also forgiving about plurals and alternate verb endings, so if you enter *dogs*, Evergreen will also find items with *dog*.

- Do not use an AND operator to join search terms.
  - An AND operator is automatically used to join all search terms. So, a search for *golden compass* will search for entries that contain both *golden* **and** *compass*.
  - Boolean operators such as *and, or, not* are not considered special and are searched for like any other word. So, a search for *golden and compass* will not return the title *golden compass*. Putting it another way, there are no *stop* words that are automatically ignored by the search engine. So, a title search for *the and or not* of (and in any order) yields a list of titles with those words.
- Don’t worry about white space, exact punctuation, or capitalization.
  - White spaces before or after a word are ignored. So, search for *golden compass* gives the same results as a search for *golden compass*.
  - A double dash or a colon between words is reduced to a blank space. So, a title search for *golden:compass* or *golden--compass* is equivalent to *golden compass*. However, space matters in this case. No result for *golden : compass* or *golden -- compass*.

    - Punctuation marks occurring at the front or end of a word are removed.
    - Diacritical marks, &, or | located anywhere in the search term but not within a word are removed. Words linked together by . (dot) are separated into two words. So, a search for |*golden.compass&* is equivalent to *golden compass*.
    - Upper and lower case letters are equivalent. So, *Golden Compass* is the same as *golden compass*.
- Enter your search words in any order. A search for *compass golden* gives the same results as a search for *golden compass*. Adding more search words gives fewer and more specific results.
    - This is also true for author searches. Both *David Suzuki* and *Suzuki, David* will return results for the same author.
- Use specific search terms. Evergreen will search for the words you specify, not the meanings, so choose search terms that are likely to appear in an item description. For example, the search *luxury hotels* will produce more relevant results than *nice places to stay*.
- Search for an exact phrase using double-quotes. For example, *"golden compass"*.
    - The order of words is important for an exact phrase search. *"golden compass"* is different than *"compass golden"*.
    - White space, punctuation and capitalization are removed from exact phrases as described above. So a phrase retains its search terms and its relative order, but not special characters and not case.
    - Two phrases are joined by AND, so a search for *"golden compass" "dark materials"* is equivalent to *"golden compass"* ***and*** *"dark materials"*.
    - To prevent stemming, use double quotes around a single word or a phrase. So, a search for *parenting* will also return results for *parental* but a search for *"parenting"* will not.
- Use * (asterisk) as a wildcard to truncate search terms, e.g. *comp* golden* may return the same results for *compass golden* and more.
- Exclude a term from the search, using - (minus) . For example, *vacations –britain* will search for materials on vacations that do not make reference to Britain.
    - Two excluded words are joined by *AND*. So, a search for *-harry -potter* is equivalent to *-harry* **and** *-potter*.
    - A + (plus) leading a term has no role and is removed. So, *+golden +compass* is equivalent to *golden compass*.

You can form more complex searches using the Advanced Search features. You can also click the *Advanced* button under the search box to build complex searches using Boolean operator OR to connect your terms.

Improving a Search With No Results

If no results were returned from your search, you will see Keyword Search Tips for expanding or altering your search.

21.4. Search Methodology

Stemming

A search for *dogs* will also return hits with the word *dog* and a search for *parenting* will return results with the words *parent* and *parental*. This is because the search uses stemming to help return the most relevant results. That is, words are reduced to their stem (or root word) before the search is performed.

The stemming algorithm relies on common English language patterns - like verbs ending in *ing* - to find the stems. This is more efficient that looking up each search term in a dictionary and usually produces desirable results. However, it also means the search will sometimes reduce a word to an incorrect stem and cause unexpected results. To prevent a word or phrase from stemming, put it in double-quotes.

Understanding how stemming works can help you to create more relevant searches, but it is usually best not to anticipate how a search term will be stemmed. For example, searching for *gold compass* does not return for *golden compass* because the search does not recognize *gold* as a stem of *golden*.

Truncation

Use the wildcard * (asterisk) at the end of the word to truncate search term.

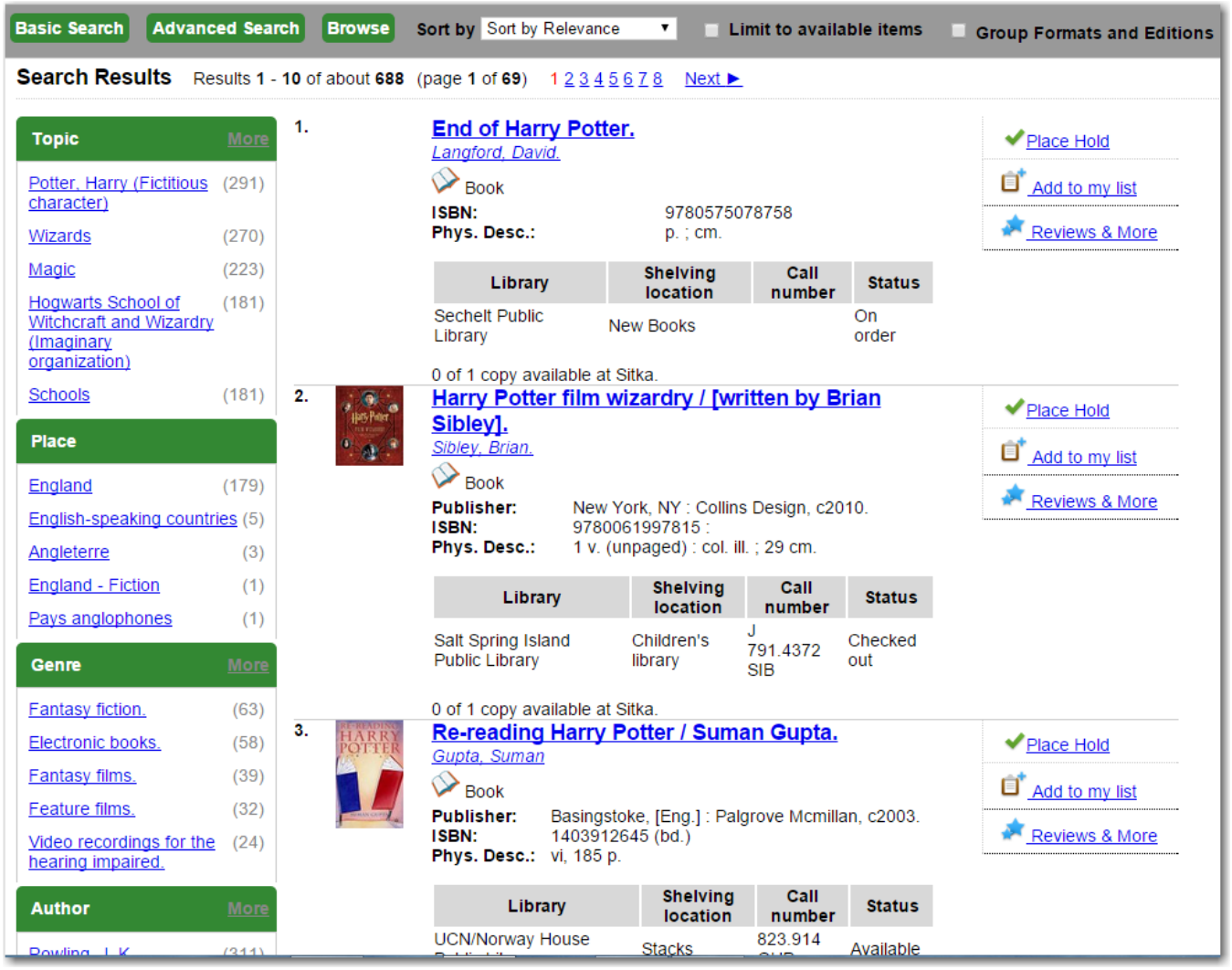
Order of Results

By default, the results in the Sitka catalogue are listed in order of relevance, similar to a search engine like Google. The relevance is determined using a number of factors, including how often and where the search terms appear in the item description, and whether the search terms are part of the title, subject, author, or series. The results that best match your search are returned first rather than results appearing in alphabetical or chronological order.

In the *Advanced Search* screen, you may select to order the search results by relevance, title, author, or publication date before you start the search. You can also re-order your search results using the *Sort by* dropdown list on the search result screen.

21.5. Search Results

The search results are a list of relevant works from the catalogue. If there are many results, they are divided into several pages. At the top of the list, you can see the total number of results and go back and forth between the pages by clicking the double arrow on top or bottom of the list or click the page number to go to that page directly. Here is an example:


Basic Search
Advanced Search
Browse
Sort by Sort by Relevance
Limit to available items
Group Formats and Editions
Search Results Results 1 - 10 of about 688 (page 1 of 69) 1 2 3 4 5 6 7 8 Next ►
Topic More
Potter, Harry (Fictitious character) (291)
Wizards (270)
Magic (223)
Hogwarts School of Witchcraft and Wizardry (Imaginary organization) (181)
Schools (181)
Place
England (179)
English-speaking countries (5)
Angleterre (3)
England - Fiction (1)
Pays anglophones (1)
Genre More
Fantasy fiction. (63)
Electronic books. (58)
Fantasy films. (39)
Feature films. (32)
Video recordings for the hearing impaired. (24)
Author More
1. End of Harry Potter.
Langford, David.
Book
ISBN: 9780575078758
Phys. Desc.: p. ; cm.
Library | Shelving location | Call number | Status
Sechelt Public Library | New Books | | On order
0 of 1 copy available at Sitka.
Place Hold
Add to my list
Reviews & More
2. Harry Potter film wizardry / [written by Brian Sibley].
Sibley, Brian.
Book
Publisher: New York, NY : Collins Design, c2010.
ISBN: 9780061997815 :
Phys. Desc.: 1 v. (unpaged) : col. ill. ; 29 cm.
Library | Shelving location | Call number | Status
Salt Spring Island Public Library | Children's library | J 791.4372 SIB | Checked out
0 of 1 copy available at Sitka.
Place Hold
Add to my list
Reviews & More
3. Re-reading Harry Potter / Suman Gupta.
Gupta, Suman
Book
Publisher: Basingstoke, [Eng.] : Palgrove Mcmillan, c2003.
ISBN: 1403912645 (bd.)
Phys. Desc.: vi, 185 p.
Library | Shelving location | Call number | Status
UCN/Norway House | Stacks | 823.914 | Available
Place Hold
Add to my list
Reviews & More

Information about the title, such as author, edition, publication date, call number, shelving location, status, etc., is displayed under each title. The icons below the title link indicate formats such as books, audio books, video recordings, and other formats. Hover your mouse over the icon, and a text explanation will show up in a small pop-up box.

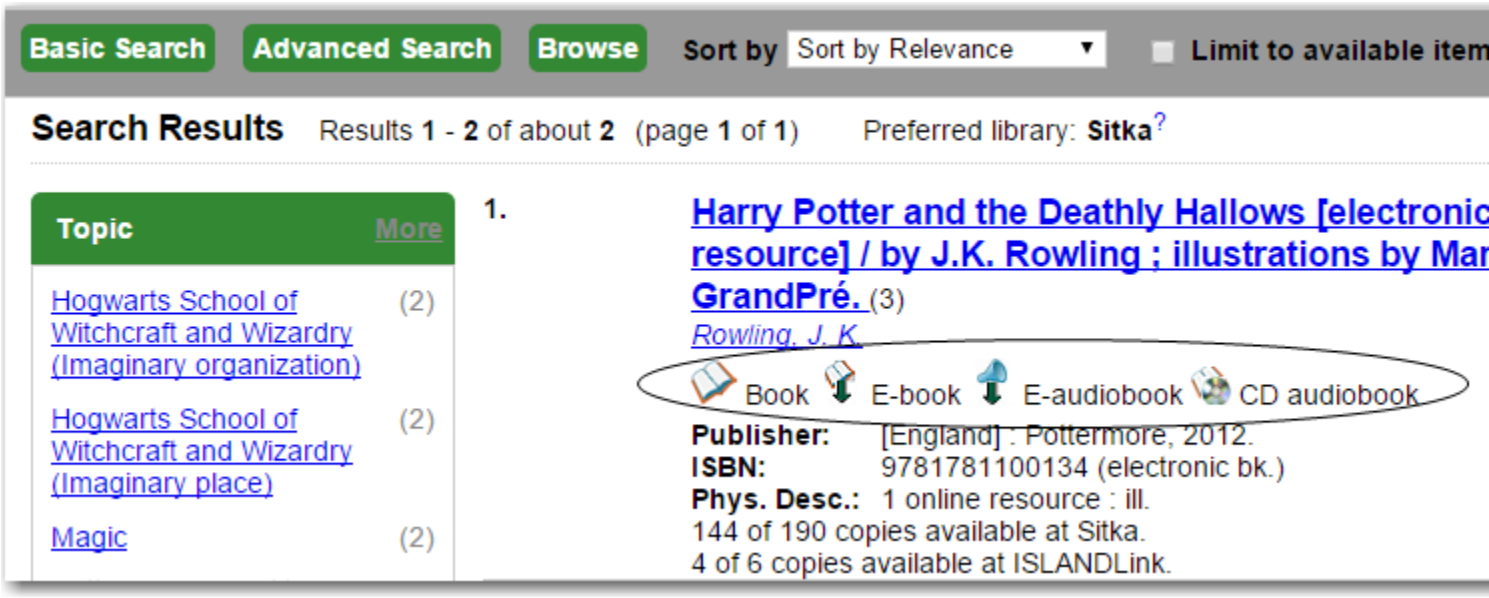
Clicking a title goes to the title details. Clicking an author searches all works by the author. If you want to place a hold on the title, click *Place Hold* to the right of the title information.

Above the results list there is a *Limit to Available* checkbox. Checking this box will filter out those titles with no available copies in the library or libraries at the moment. Usually you will see your search results are re-displayed with fewer titles

The *Sort by* dropdown list is beside the *Limit to Available* button. Clicking an entry on the list will re-sort your search results accordingly.

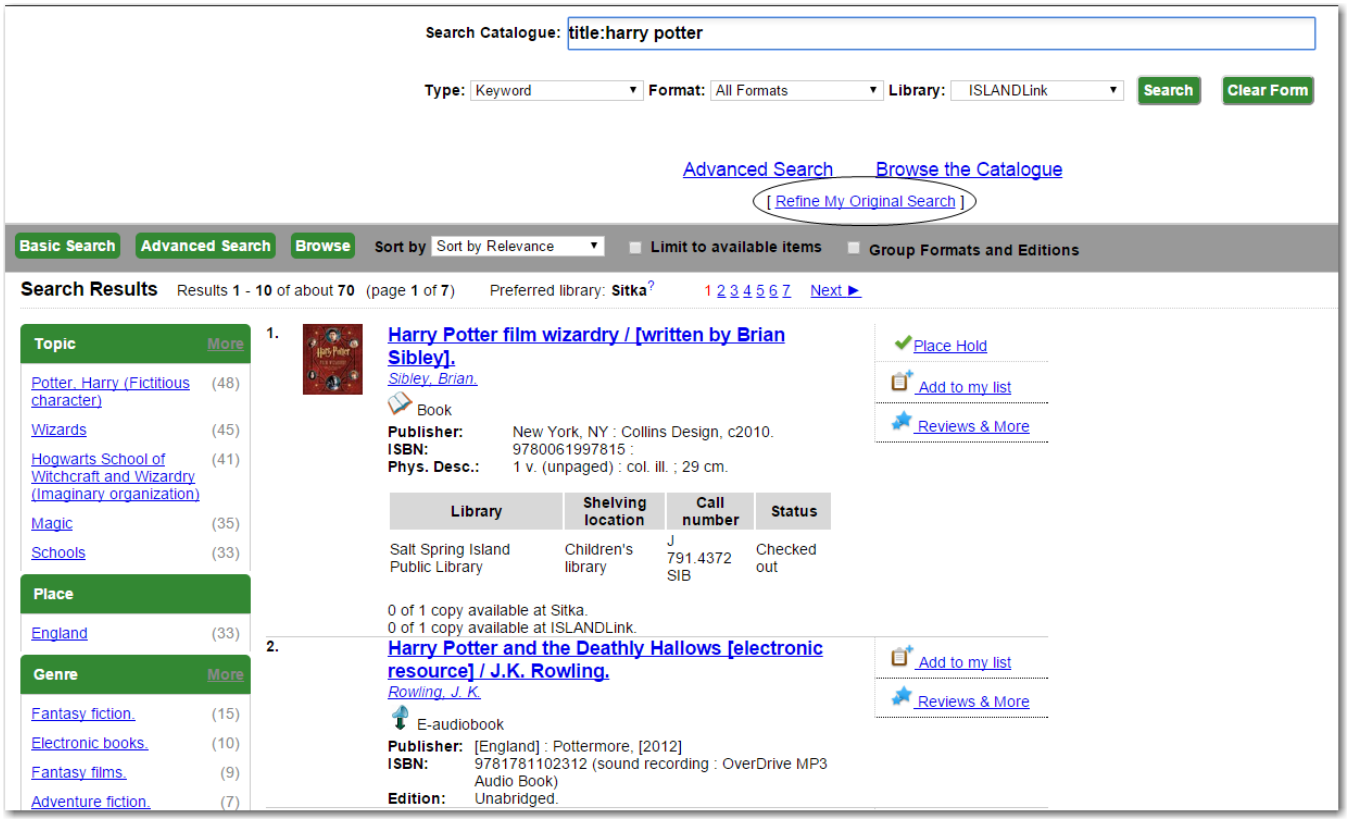
Formats and Editions

If you have selected *Group Formats and Editions* with your search, your search results are grouped by various formats and editions of the same title. Multiple format icons may be lit up.


Basic Search
Advanced Search
Browse
Sort by
Sort by Relevance
Limit to available item
Search Results
Results 1 - 2 of about 2 (page 1 of 1)
Preferred library: Sitka
Topic
More
Hogwarts School of Witchcraft and Wizardry (Imaginary organization) (2)
Hogwarts School of Witchcraft and Wizardry (Imaginary place) (2)
Magic (2)
1.
Harry Potter and the Deathly Hallows [electronic resource] / by J.K. Rowling ; illustrations by Mar GrandPré. (3)
Rowling, J. K.
Book
E-book
E-audiobook
CD audiobook
Publisher: [England] : Pottermore, 2012.
ISBN: 9781781100134 (electronic bk.)
Phys. Desc.: 1 online resource : ill.
144 of 190 copies available at Sitka.
4 of 6 copies available at ISLANDLink.

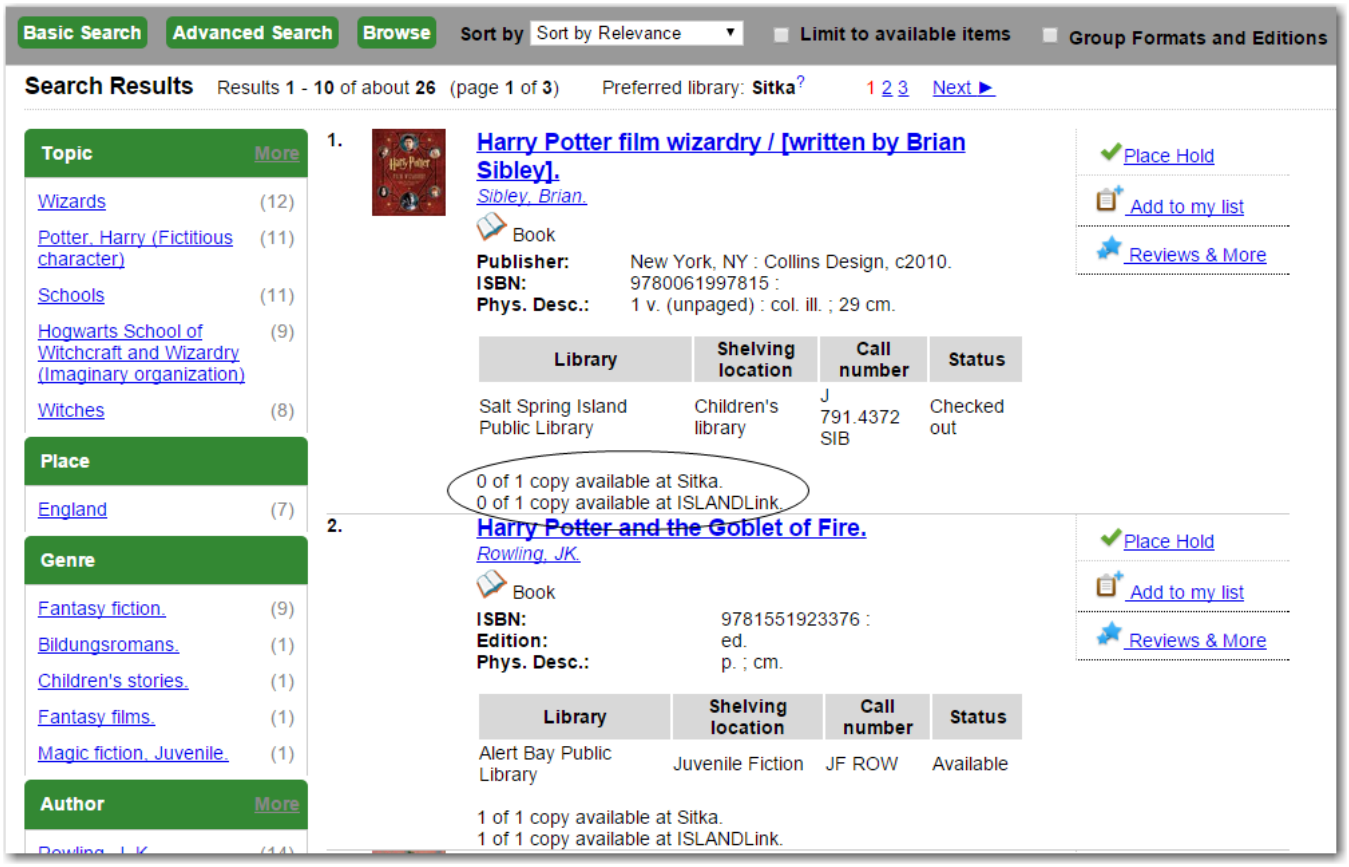
Refine Your Search

You may refine your search results by *Authors*, *Subjects*, and *Series*. Selecting one of these links on the left side of search results page narrows down the search results to that subject, author, or series.You may also refine your search by clicking the hyperlink labelled *Refine My Orignal Search* at top of search results. Refining a search this way allows you to add search filters such as Publication Date, Format, Language, etc., to your original search.

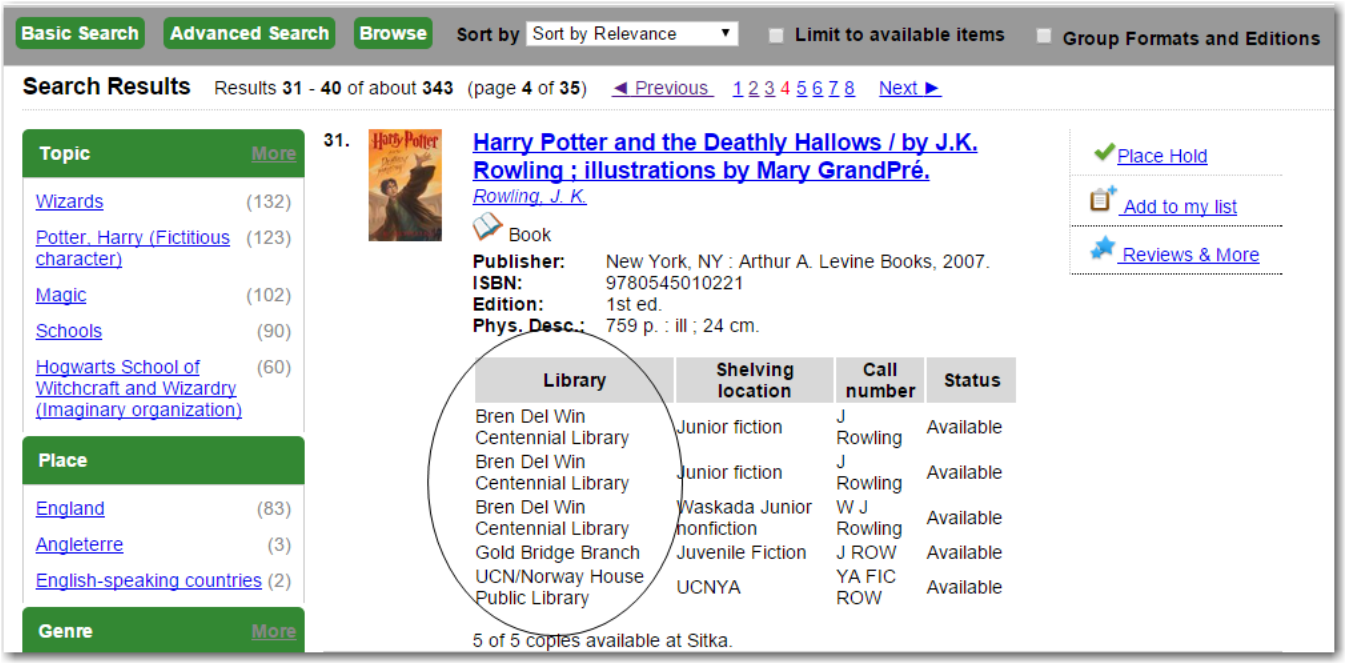


Availability

The number of available copies and total copies are displayed below the title details. If you are using a catalogue inside a library or accessing a library's online catalogue from its homepage, you will see how many copies are available in that library. If the library belongs to a multi-branch library system you can see how many copies are available in all branches.

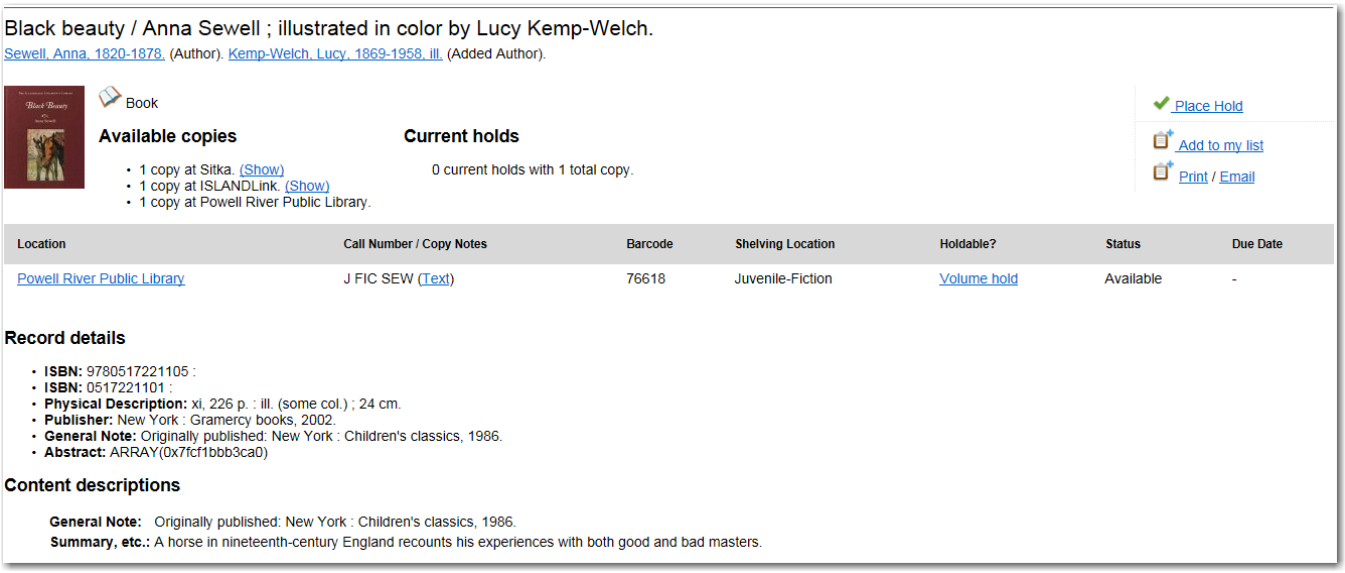


If you access the catalogue from http://catalogue.libraries.coop, depending on your search scope, you may see multiple rows of *Available Copies*: the branch, the library, the regional libraries and all Sitka libraries that are currently using the Sitka Evergreen system in BC and MB.



Viewing a record

Click on a title to view a detailed record of the title, including descriptive information, location and availability, and options for placing holds.


Black beauty / Anna Sewell ; illustrated in color by Lucy Kemp-Welch.
Sewell, Anna, 1820-1878. (Author). Kemp-Welch, Lucy, 1869-1958, ill. (Added Author).
Book
Available copies
• 1 copy at Sitka. (Show)
• 1 copy at ISLANDLink. (Show)
• 1 copy at Powell River Public Library.
Current holds
0 current holds with 1 total copy.
Place Hold
Add to my list
Print / Email
Location
Call Number / Copy Notes
Barcode
Shelving Location
Holdable?
Status
Due Date
Powell River Public Library
J FIC SEW (Text)
76618
Juvenile-Fiction
Volume hold
Available
-
Record details
• ISBN: 9780517221105 :
• ISBN: 0517221101 :
• Physical Description: xi, 226 p. : ill. (some col.) ; 24 cm.
• Publisher: New York : Gramercy books, 2002.
• General Note: Originally published: New York : Children's classics, 1986.
• Abstract: ARRAY(0x7fcf1bbb3ca0)
Content descriptions
General Note: Originally published: New York : Children's classics, 1986.
Summary, etc.: A horse in nineteenth-century England recounts his experiences with both good and bad masters.

Details

The record shows details such as the cover image, title, author, publication information, and an abstract or summary, if available.

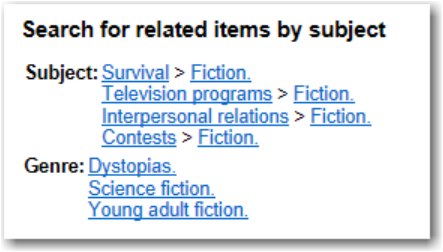
The Record Details view shows how many copies are at the library or libraries you have selected, and whether they are available or checked out. It also displays the *Call number* and *Copy Location* for locating the item on the shelves.

Clicking on *Text* beside the call number will allow you to send the item's call number by text message, if desired. Clicking the location library link will reveal information about owning library, such as address and open hours.

Below the local details you can open up various tabs to display more information. You can select *Reviews and More* to see the book's summaries and reviews, if available. You can select *Shelf Browser* to view items appearing near the current item on the library shelves. Often this is a good way to browse for similar items. You can select *MARC Record* to display the record in MARC format. If your library offers the service, clicking on *Awards, Reviews, and Suggested Reads* will reveal that additional information.

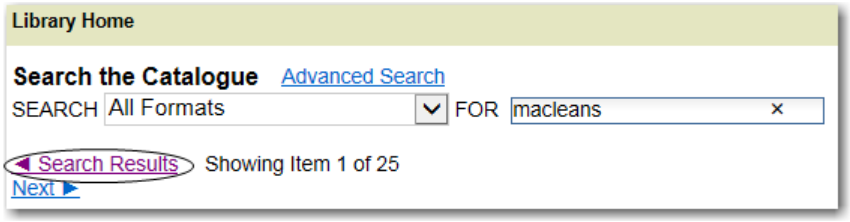
Search Additional Items by Author, Subject or Series

You can search for additional items by an author, one of the subjects in the record or other works in the same series. Clicking the author, subject or series will start a new search in the catalogue. You can do this from the results page, or from within the record details view, as shown below.

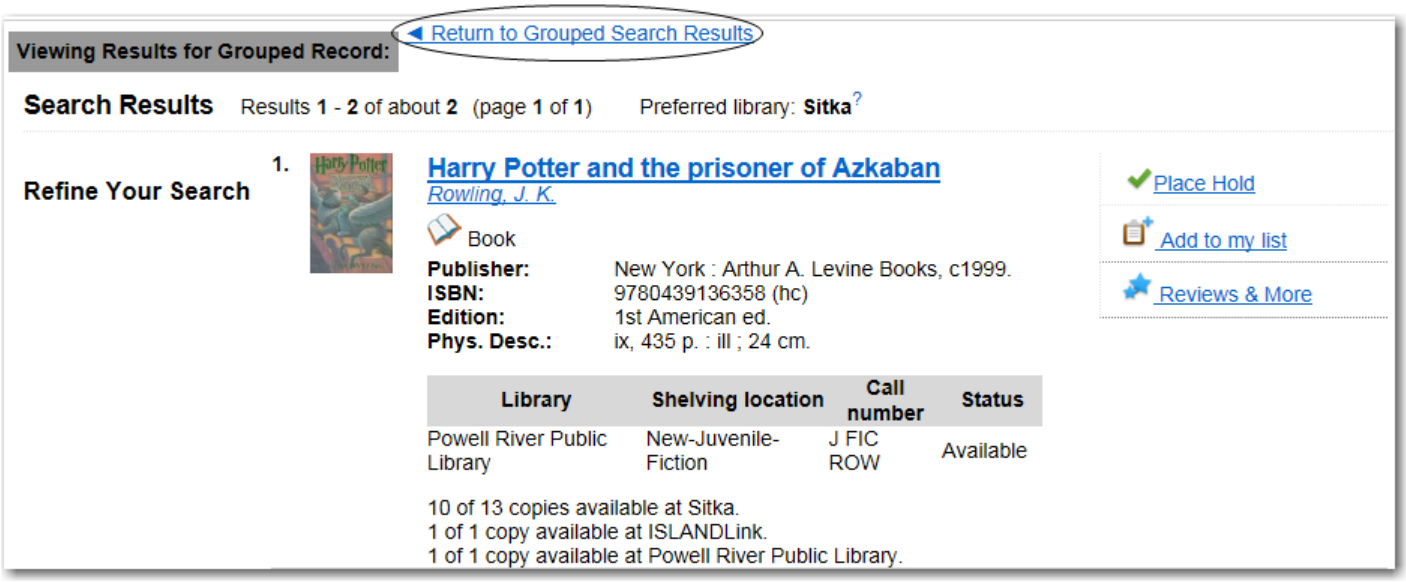


Going back

When you are viewing a specific record, you can always go back to your title list by clicking the link *Search Results* on the left of the page.



If you have selected *Group Formats and Editions* with your search, your search results are grouped by various formats and editions of the same title under *My Search Results*. You can always go back to this page by selecting the link to *Return to Grouped Search Results.*

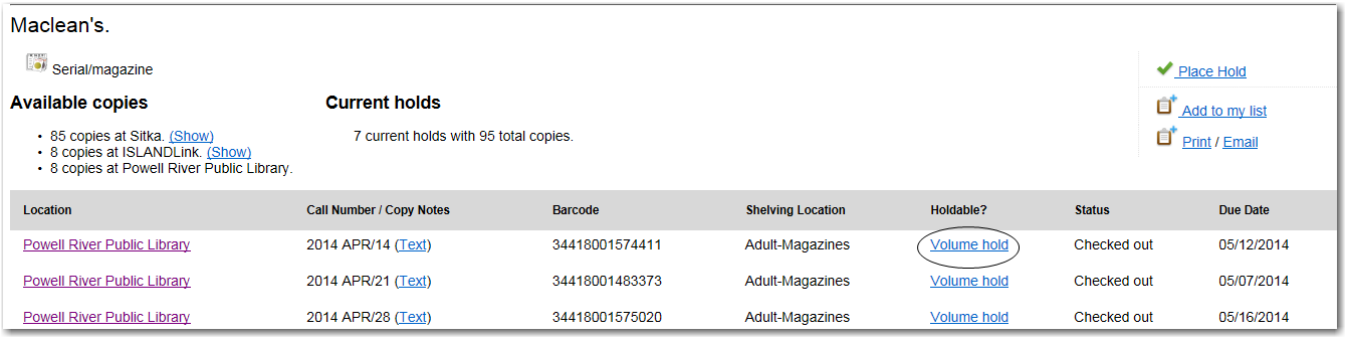

Viewing Results for Grouped Record:
◄ Return to Grouped Search Results
Search Results
Results 1 - 2 of about 2 (page 1 of 1)
Preferred library: Sitka
Refine Your Search
1.
Harry Potter and the prisoner of Azkaban
Rowling, J. K.
Book
Publisher: New York : Arthur A. Levine Books, c1999.
ISBN: 9780439136358 (hc)
Edition: 1st American ed.
Phys. Desc.: ix, 435 p. : ill ; 24 cm.
Library
Shelving location
Call number
Status
Powell River Public Library
New-Juvenile-Fiction
J FIC ROW
Available
10 of 13 copies available at Sitka.
1 of 1 copy available at ISLANDLink.
1 of 1 copy available at Powell River Public Library.
Place Hold
Add to my list
Reviews & More

You can start a new search at any time by entering new search terms in the search box at the top of the page, or by selecting the *Another Search*, *Basic Search*,or *Advanced Search* link at top of search results, depending on what screen you are on when wanting to do another search.

Placing Holds

Holds can be placed on either the title results or the title details page. If the item is available, it will be pulled from the shelf and held for you. If all copies at your local library are checked out, you will be placed on a waiting list and you will be notified when items become available.

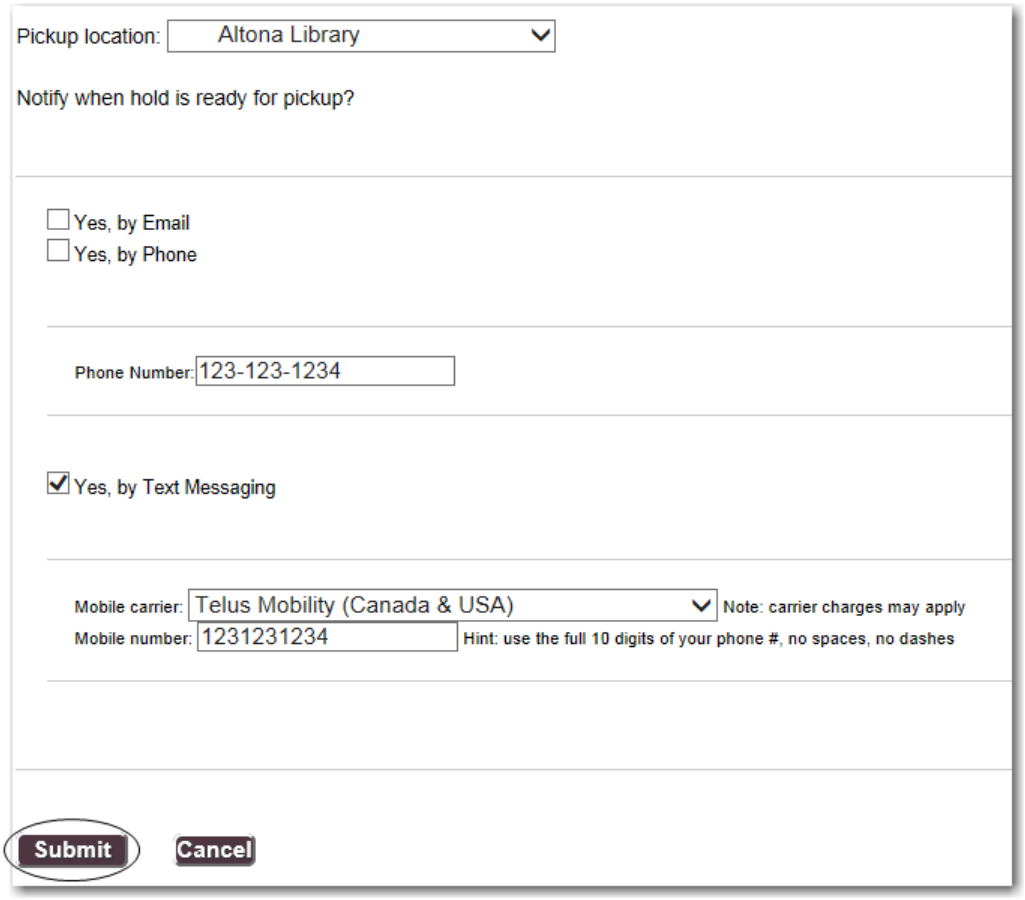
On the title details page, you can select the *Place Hold* link in the upper right corner of the record to reserve the item. You will need your library account user name and password. A hold placed on upper right *Place Hold* button means any copy attached to the record will fill your hold. This is generally the best method when requesting a book, as your hold will be filled by any copy of the title record you are viewing. However, if you want a specific issue of a magazine or a DVD or video in a set, you can select to place a *Volume* hold in the item details view just below. In this example the hold is on the April 14 2014 issue of Macleans magazine.



You may choose to be notified by phone, text message, or email. The phone number set up in your account will automatically show up. Once you select the *Yes, by phone* or *Yes, by text* checkbox, you can supply a different

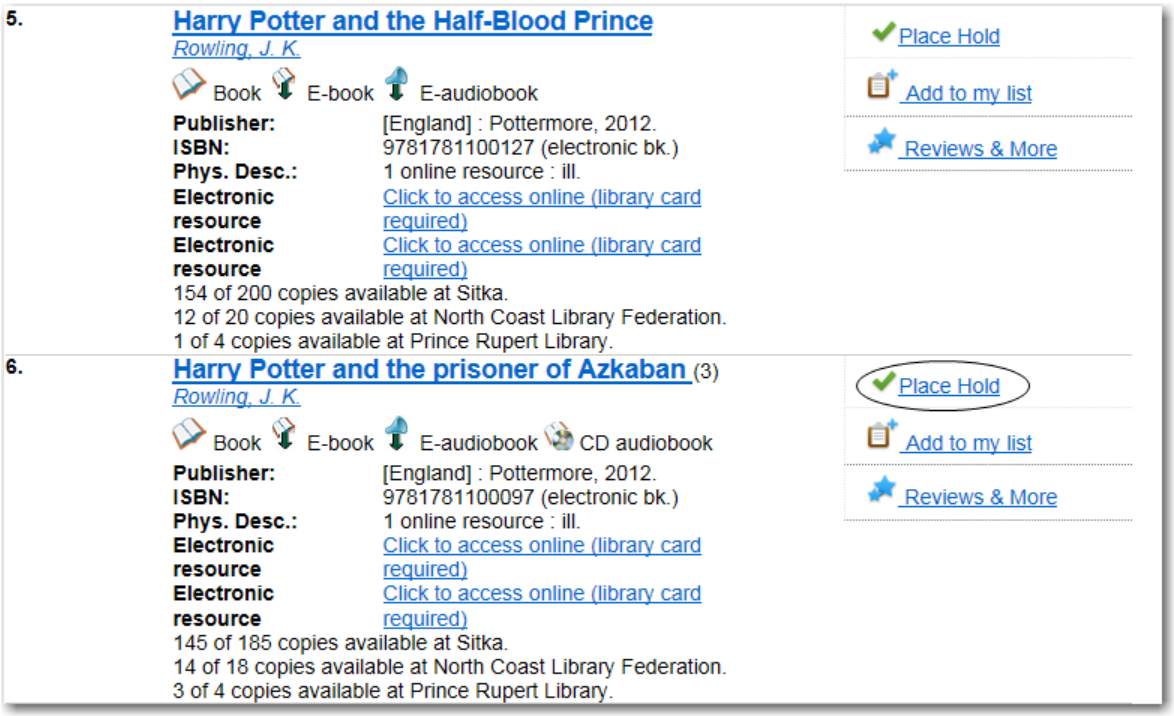
phone number for this hold only. The notification method will be selected automatically if you have set it up in your account preferences. However, you may choose your method on this screen, overriding any default set up in your account.

You can view and cancel a hold at anytime. Before your hold is captured, which means an item has been held waiting for you to pick it up, you can edit, suspend or activate it. You need to log into your account to do this.

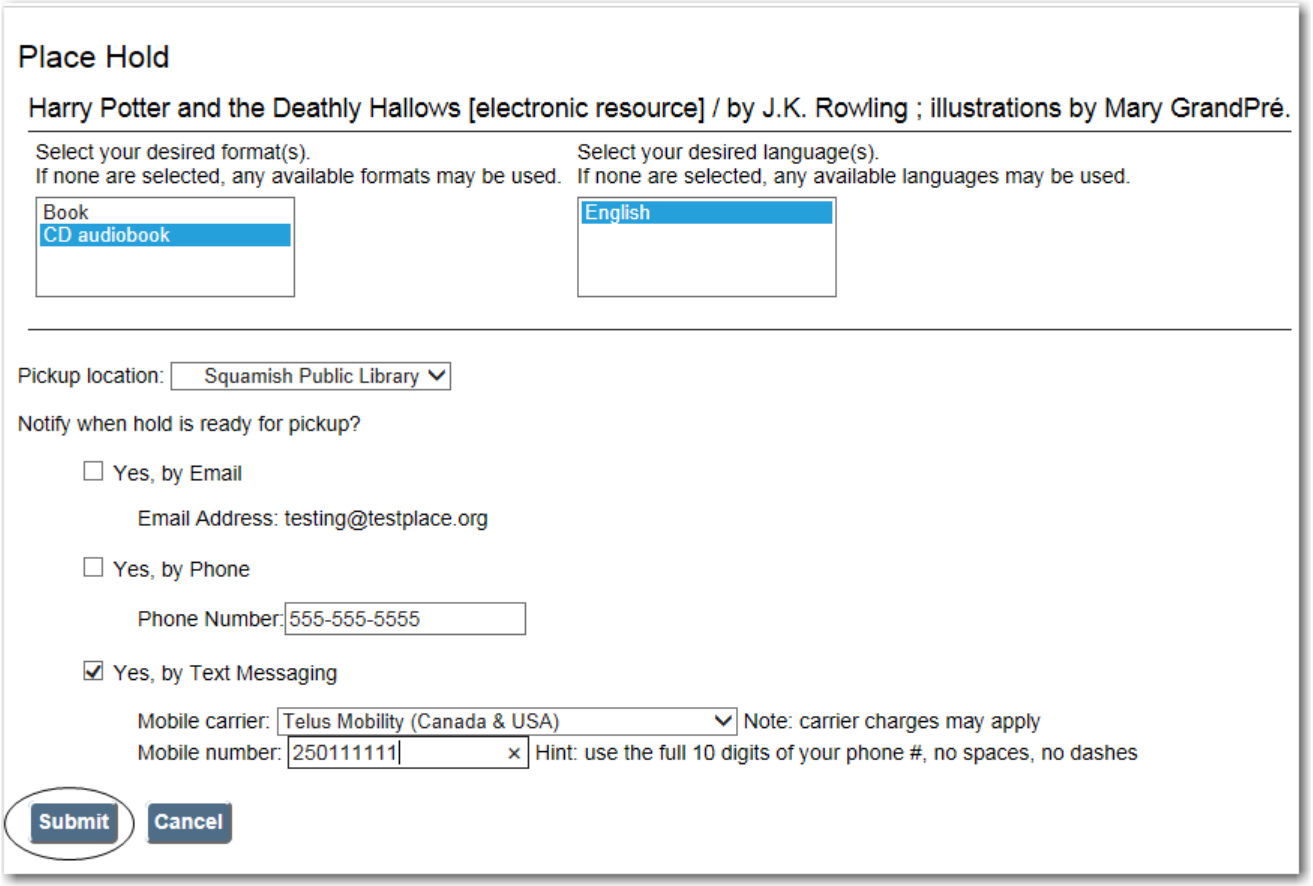

Pickup location: Altona Library
Notify when hold is ready for pickup?
Yes, by Email
Yes, by Phone
Phone Number: 123-123-1234
Yes, by Text Messaging
Mobile carrier: Telus Mobility (Canada & USA)
Note: carrier charges may apply
Mobile number: 1231231234
Hint: use the full 10 digits of your phone #, no spaces, no dashes
Submit
Cancel

Placing Holds on Multiple Records of the Same Title

If you've selected *Group by Formats and Edition* when doing a search, you may place a hold on multiple records of the title but of different formats or editions by clicking *Place Hold* to the right of the meta record.

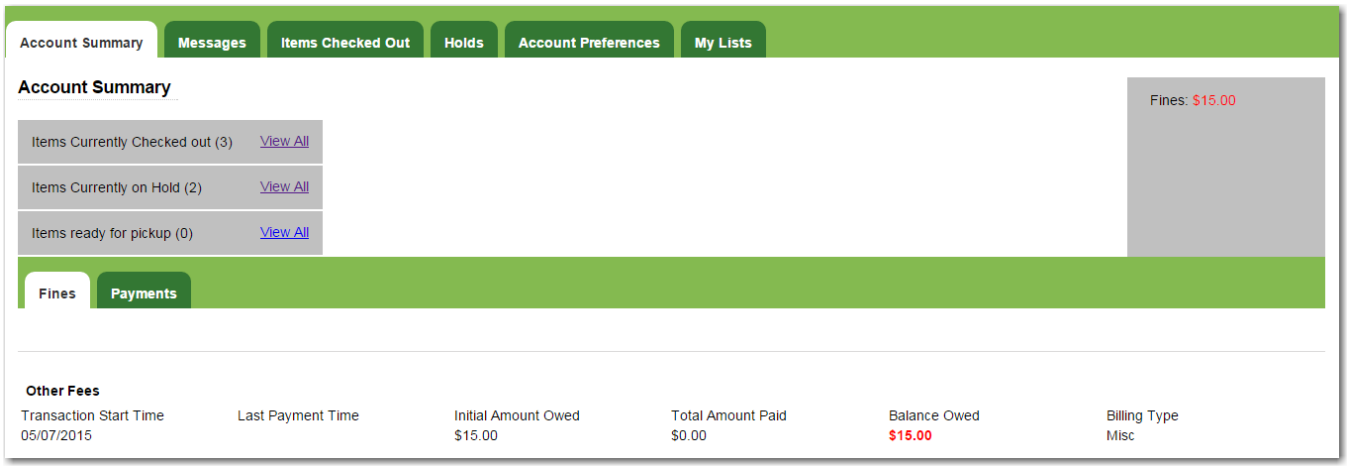

5.
Harry Potter and the Half-Blood Prince
Rowling, J. K.
Book E-book E-audiobook
Publisher: [England] : Pottermore, 2012.
ISBN: 9781781100127 (electronic bk.)
Phys. Desc.: 1 online resource : ill.
Electronic resource Click to access online (library card required)
Electronic resource Click to access online (library card required)
154 of 200 copies available at Sitka.
12 of 20 copies available at North Coast Library Federation.
1 of 4 copies available at Prince Rupert Library.
Place Hold
Add to my list
Reviews & More
6.
Harry Potter and the prisoner of Azkaban (3)
Rowling, J. K.
Book E-book E-audiobook CD audiobook
Publisher: [England] : Pottermore, 2012.
ISBN: 9781781100097 (electronic bk.)
Phys. Desc.: 1 online resource : ill.
Electronic resource Click to access online (library card required)
Electronic resource Click to access online (library card required)
145 of 185 copies available at Sitka.
14 of 18 copies available at North Coast Library Federation.
3 of 4 copies available at Prince Rupert Library.
Place Hold
Add to my list
Reviews & More

You may select acceptable formats on placing hold screen.


Place Hold
Harry Potter and the Deathly Hallows [electronic resource] / by J.K. Rowling ; illustrations by Mary GrandPré.
Select your desired format(s).
If none are selected, any available formats may be used.
Book
CD audiobook
Select your desired language(s).
If none are selected, any available languages may be used.
English
Pickup location: Squamish Public Library
Notify when hold is ready for pickup?
Yes, by Email
Email Address: testing@testplace.org
Yes, by Phone
Phone Number: 555-555-5555
Yes, by Text Messaging
Mobile carrier: Telus Mobility (Canada & USA) Note: carrier charges may apply
Mobile number: 250111111 Hint: use the full 10 digits of your phone #, no spaces, no dashes
Submit
Cancel

Chapter 22. My Account

You can access information about your account from any page in the Sitka catalogue by selecting the *My Account* link at the top right of the page. Your account information includes contact information, items you have checked out or on hold, fines, account preferences, note left by the library (if any) and lists, a place for you to keep reading lists or other lists of items. Each of the sections in the *My Account* area is described in this chapter.



22.1. Logging into Your Account

1. Click on the *My Account* link on any search page.

2. Enter your username or your library barcode.

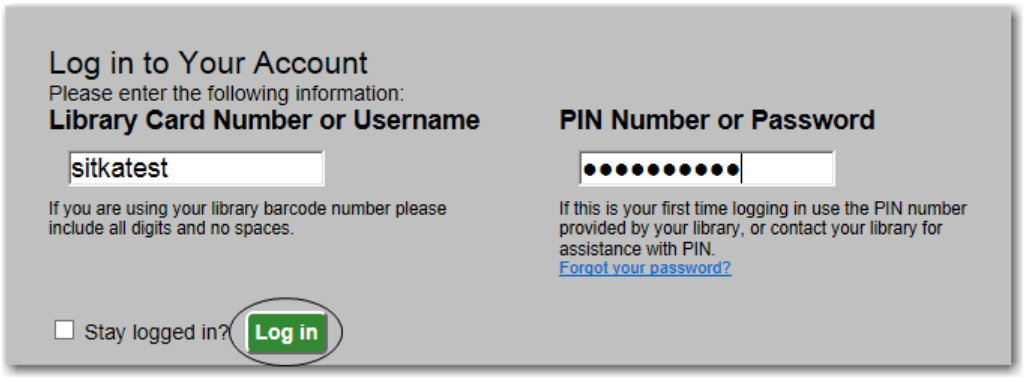
   If this is your first time logging in, your username will be your library card number. You have the option to change your username on the *Account Preferences* screen.

3. Enter your password.

   You should have been given a password when you received your library card.

If you do not have or cannot recall your password please contact your local librarian to have the password reset or use the Forgot Your Password link.

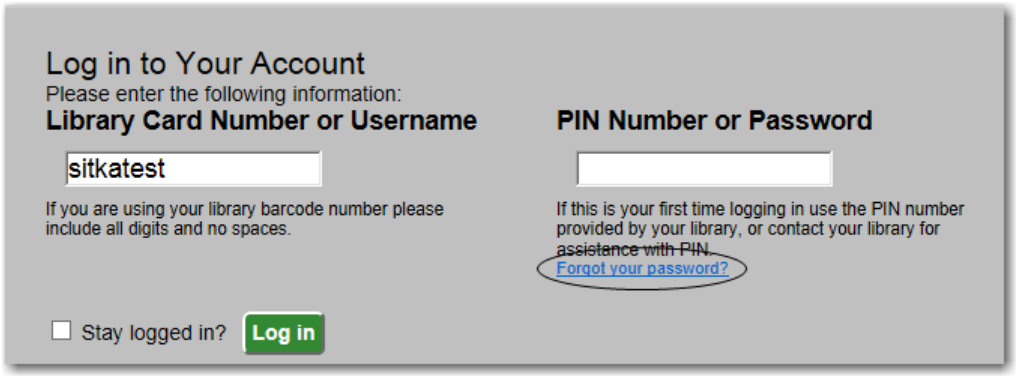
4. Click on the *Login* button.


Log in to Your Account
Please enter the following information:
Library Card Number or Username
PIN Number or Password
sitkatest
If you are using your library barcode number please include all digits and no spaces.
If this is your first time logging in use the PIN number provided by your library, or contact your library for assistance with PIN.
Forgot your password?
Stay logged in?
Log in

22.2. Resetting Your Password

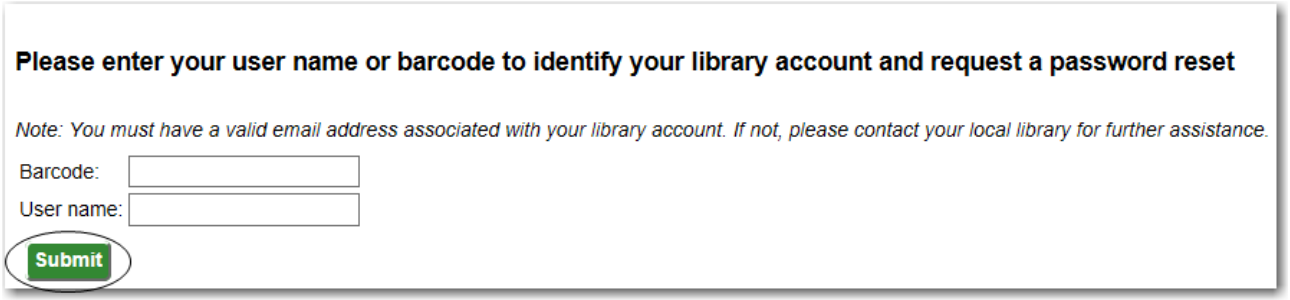
If you have an email address recorded in your library account you can use the *Forgot Your Password?* link in the event that you forget your password.

1. Click on the *Forgot Your Password?* link.


Log in to Your Account
Please enter the following information:
Library Card Number or Username
PIN Number or Password
sitkatest
If you are using your library barcode number please include all digits and no spaces.
If this is your first time logging in use the PIN number provided by your library, or contact your library for assistance with PIN.
Forgot your password?
Stay logged in?
Log in

2. Enter your username or barcode into the appropriate field. Note you must enter only one value, this is an either or choice, as some people only use their barcode to access their account, while others only ever use a user name.

3. Click *Submit*.


Please enter your user name or barcode to identify your library account and request a password reset
Note: You must have a valid email address associated with your library account. If not, please contact your local library for further assistance.
Barcode:
User name:
Submit

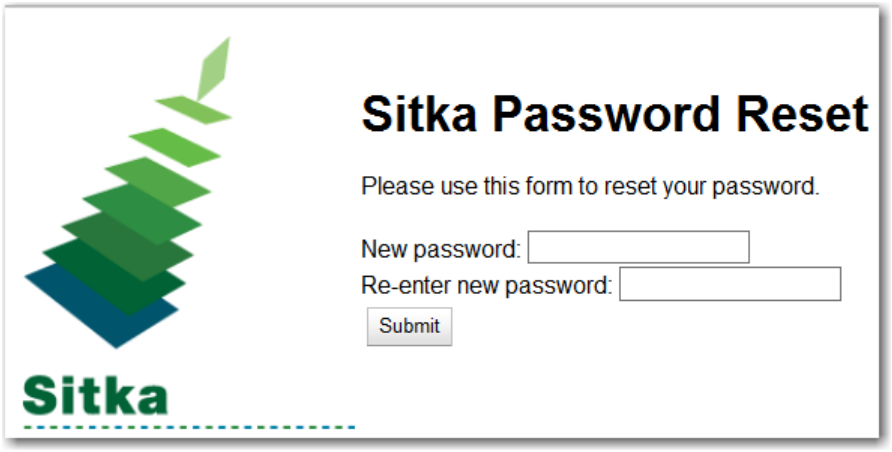
4. Check your email account for the *Library Account Password Reset Request* email.

Reset emails are sent every two minutes.

5. Open the link provided in the *Library Account Password Reset Request* email.

6. Enter your new password in the password reset form in the browser.

   You must enter the password twice to ensure that you do not make a mistake. If the passwords match, you will then be able to log in to your library account with the new password.



Please contact your local library if you do not receive the *Library Account Password Reset Request* email or if you continue to be unable to login to your account.

22.3. Account Information

Account Summary

Account Preferences

Items checked-out

Items on Hold

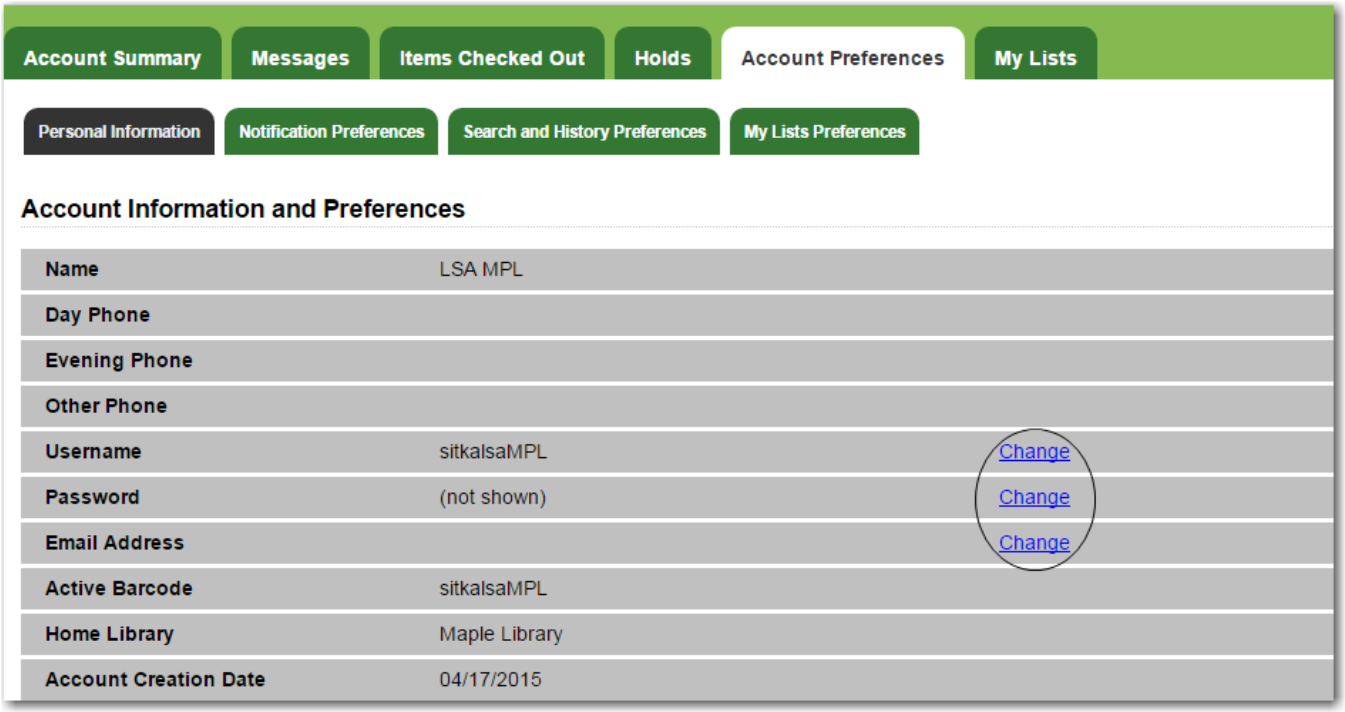
Fines and Payment

Account Summary

The default view when you login to your account is the *Account Summary* page. This view gives you an overview of items checked out, items on hold and any fines you may have. You can access any of these screens by clicking on relevant tab.

Account Preferences

You can change the username and password that you use to log in to your library account as well as the email address the library uses to contact you in the *Personal Information* tab by clicking the *Change* link next to the item.



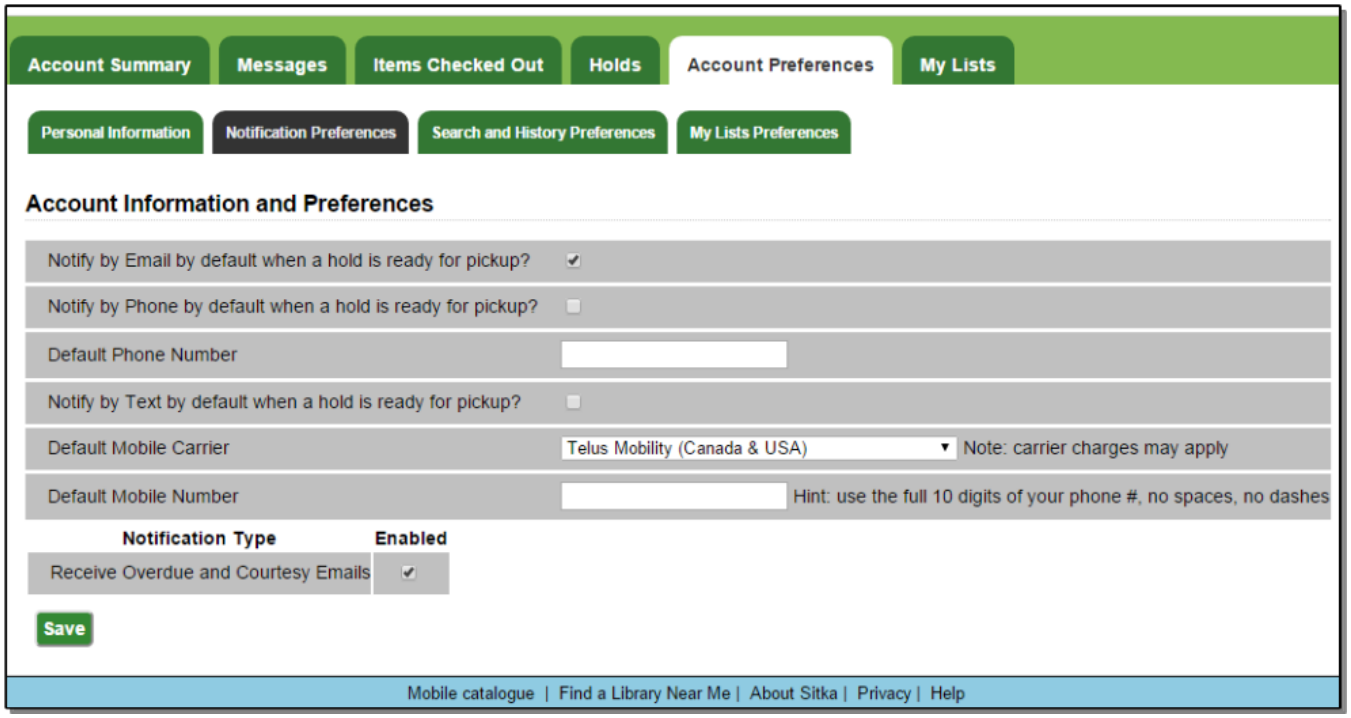
Depending on your library's policy, you may request a change to your address by submitting a new address in your account. Your library staff will verify it and update your account.

If you need to make a change to other information, such as your phone number, please see the library staff.

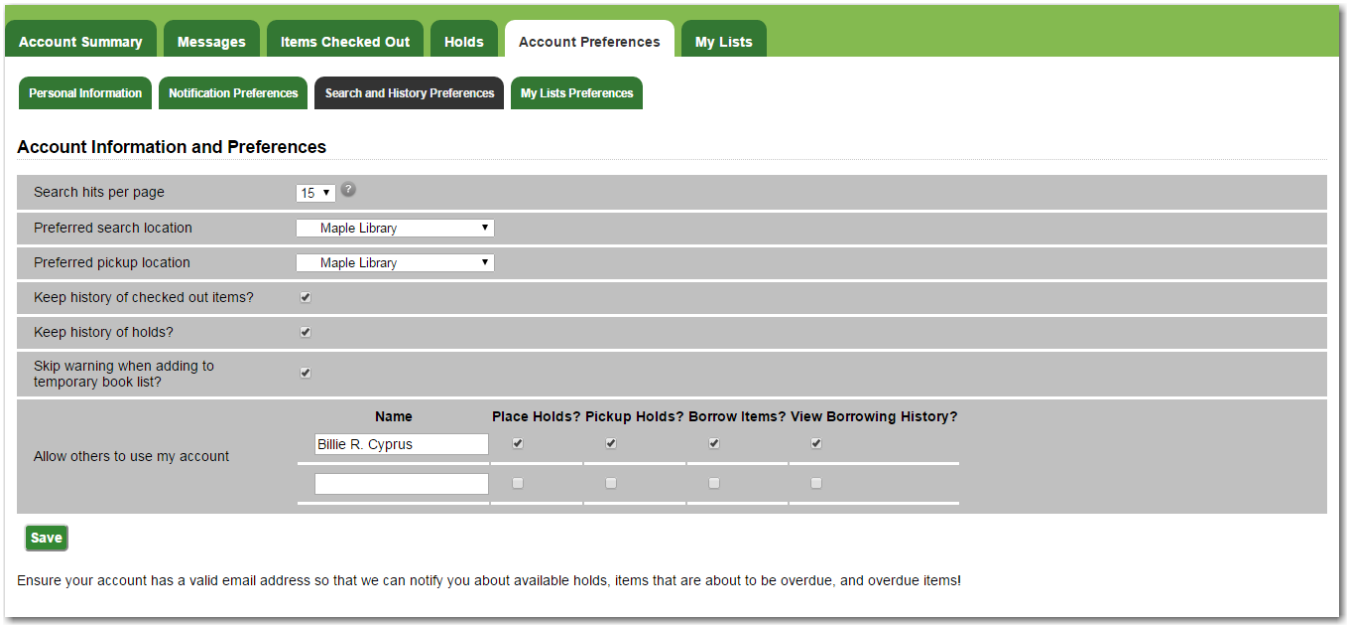
The *Notification Preferences* tab is where you set your preferences for holds notification. You can choose to be contacted by email, phone or text message.

This is also where you can opt-out of receiving courtesy and overdue email notices using the *Receive Overdue and Courtesy Emails* setting.

Un-checking this box means your library will not send you any emails for items coming due or overdue. You are still responsible for returning items on time and paying any applicable fines.

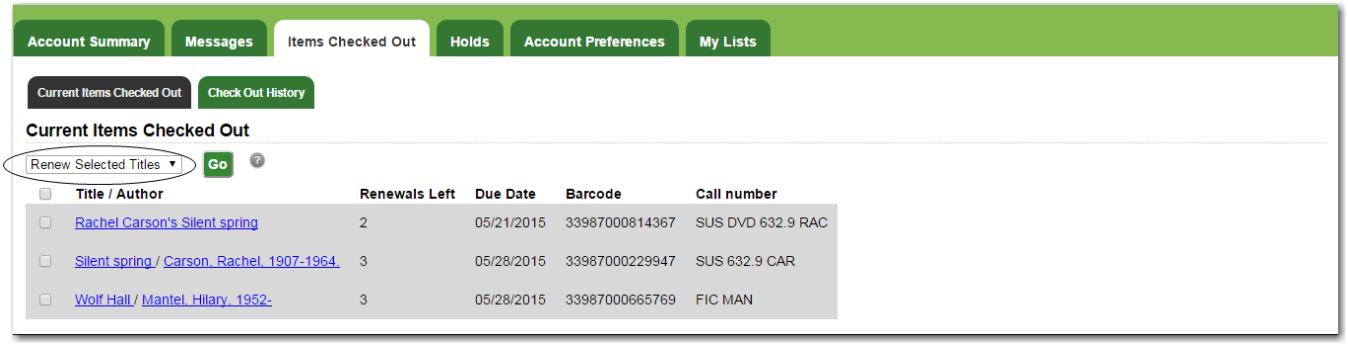

Account Summary
Messages
Items Checked Out
Holds
Account Preferences
My Lists
Personal Information
Notification Preferences
Search and History Preferences
My Lists Preferences
Account Information and Preferences
Notify by Email by default when a hold is ready for pickup?
Notify by Phone by default when a hold is ready for pickup?
Default Phone Number
Notify by Text by default when a hold is ready for pickup?
Default Mobile Carrier
Telus Mobility (Canada & USA)
Note: carrier charges may apply
Default Mobile Number
Hint: use the full 10 digits of your phone #, no spaces, no dashes
Notification Type
Enabled
Receive Overdue and Courtesy Emails
Save
Mobile catalogue | Find a Library Near Me | About Sitka | Privacy | Help

The *Search and History Preferences* tab allows you to configure how many search results are displayed per page on your catalogue searches, your preferred pick up location if a member of a multi branch library, whether you want to keep a history of your check outs and holds, and who you allow to use your library account on your behalf. The check out and holds history is not retroactive, it takes effect once you choose to retain your history. You may also choose to disable a warning about adding items to a temporary list.



Items Checked Out

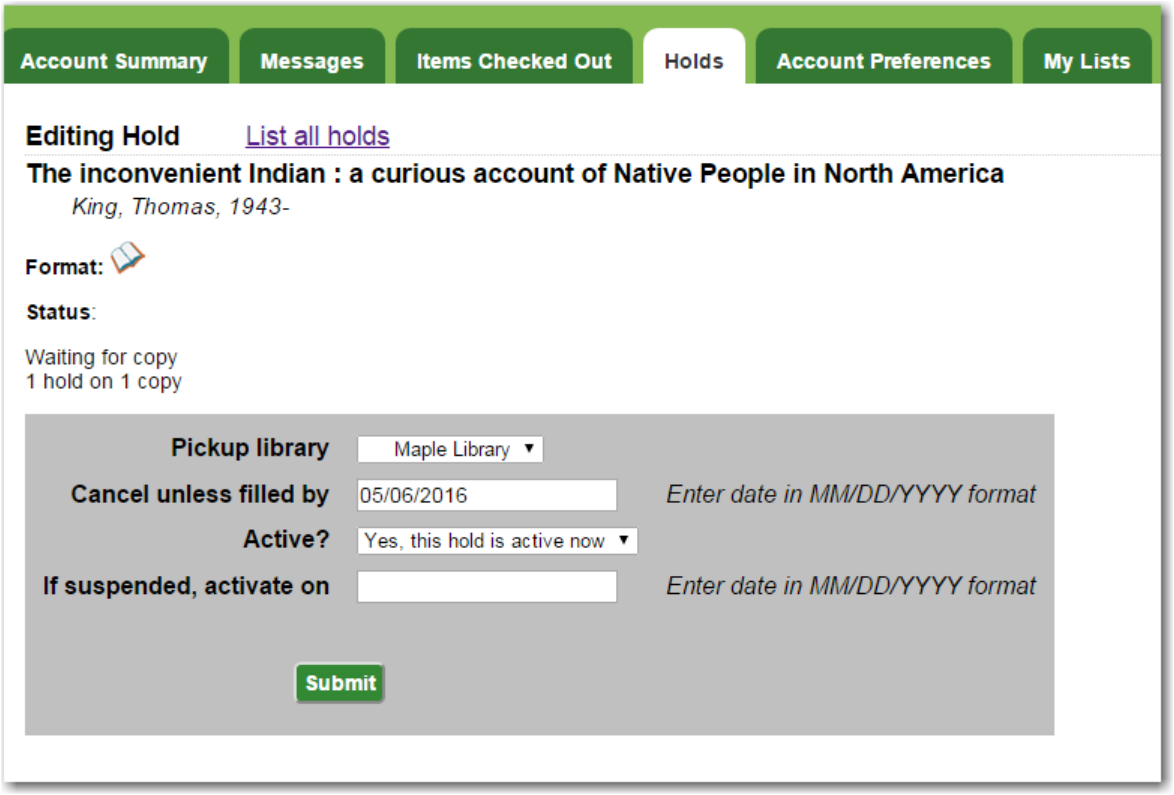
Select the *Items Checked Out* tab at the top of the *My Account* area to display all of the items you currently have checked out, their due dates, and the number of times you can renew them. Items are sorted by the due date. You can simply select the items you wish to renew and then click *Go* beside *Renew Selected Titles*.



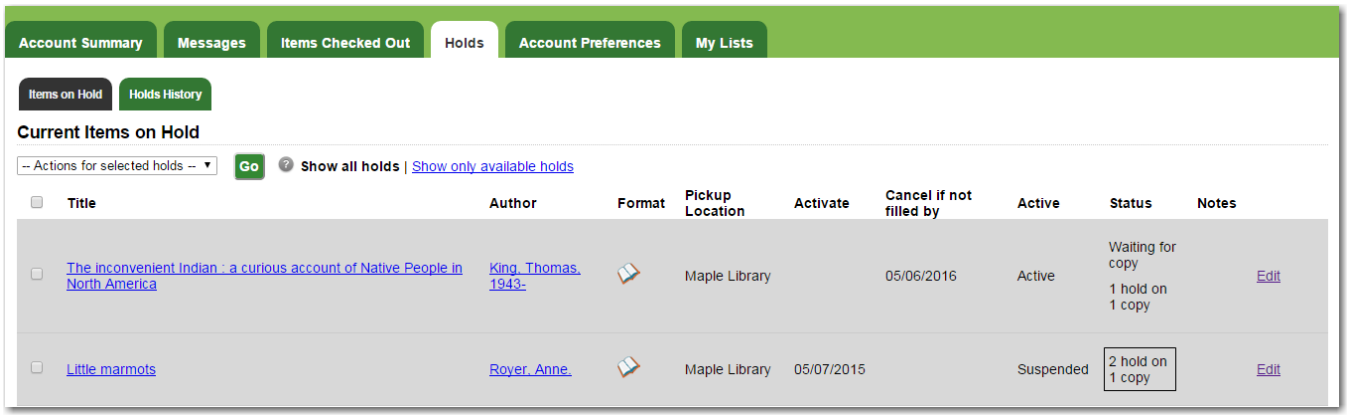
Items on Hold

The *Holds* tab shows the materials you currently have holds (reserves) on. The title, author, format, pickup location, status and expiration date are displayed. The *Active* column shows whether your hold is currently active.

Clicking the *Edit* link will bring you to the hold editing screen, where you may suspend the hold, if not already captured, or change the activation date or cancellation date. If your library has multiple branches you may also change the pick up location.



You can use the checkbox beside each hold to select the hold and the *Action for selected holds* dropdown list to suspend, activate, set/change an activation date or cancel the selected holds. You may set an activation date when you suspend your hold or leave the date blank and manually activate it later. A suspended hold will not lose its hold queue position.



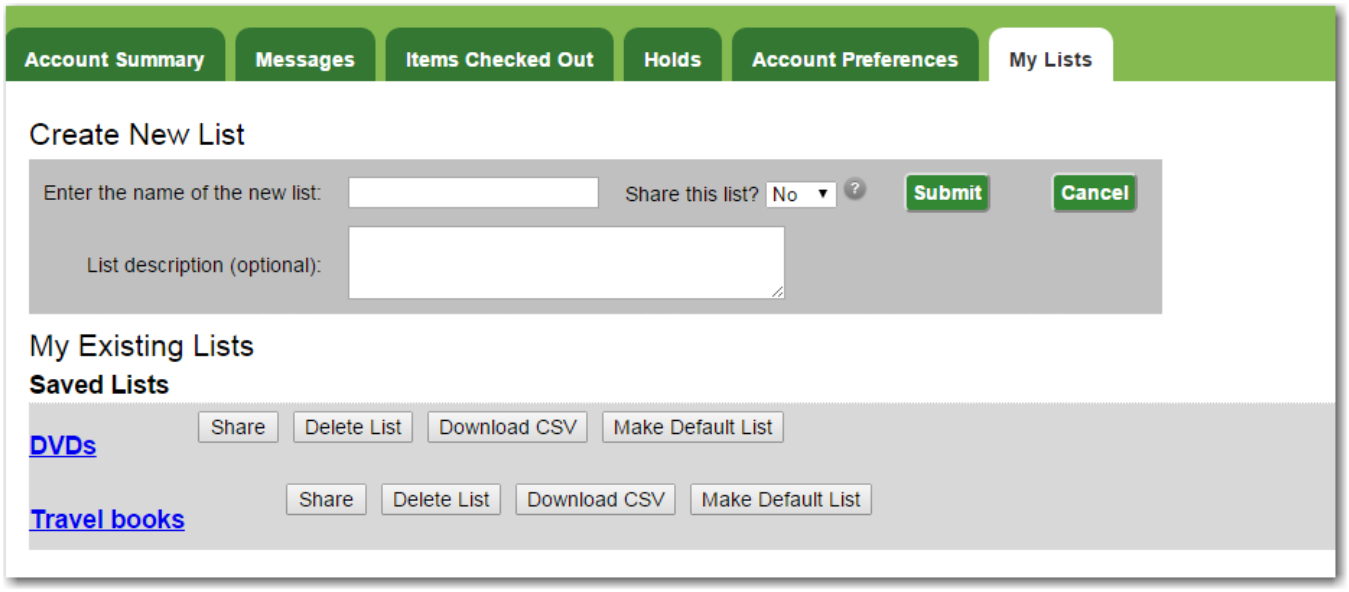
Your position in the hold queue is indicated by the first number in the status column. For example "3 hold on 1 circulating copy" indicates you are third in the hold queue.

Fines and Payments

The *Fines* and *Payments* tabs, at bottom of the *Account Summary* screen, display any fines or fees that you have accrued and the payments you have made. You can pay your fines at the library.

22.4. My Lists

The *My Lists* section allows you to create, edit, share, and remove lists.



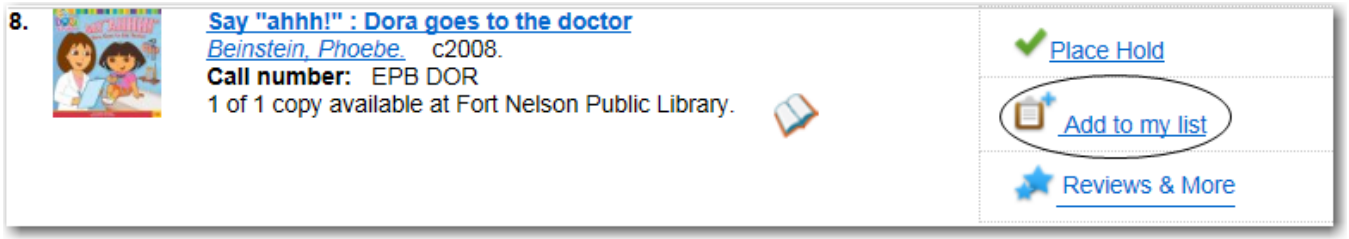
Lists are lists of items that can be used for a number of purposes. For example, to keep track of what books you have read, if you have not chosen to retain your checkout history as described in previous section, books you would like to read, to maintain a class reading list, to maintain a reading list for a book club, to keep a list of books you would like for your birthday, etc. There are an unlimited number of uses.

You can see the lists you have created in the *My Lists* section of the *My Account* area.

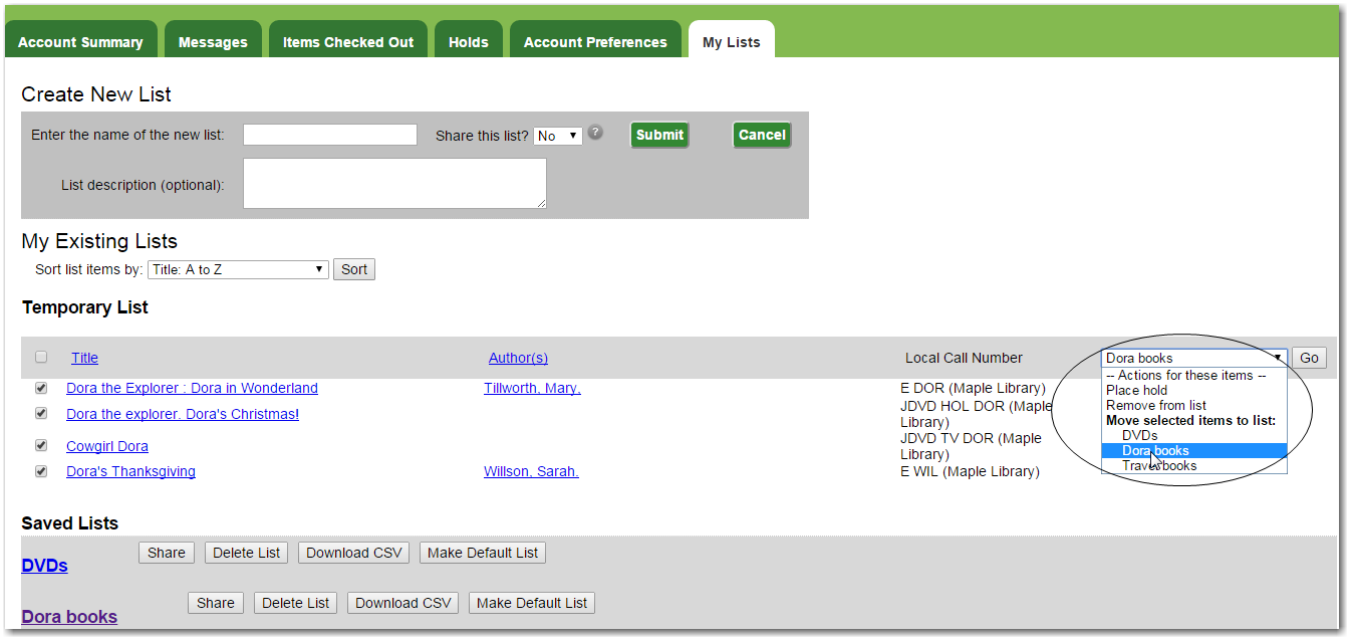
How do I create a list?

Best practice is to create a list after you have logged in to your account. In the *My Account* area, click on *My Lists*. In the *Create new list* section, enter a name for your list into the text box. You may also enter an optional description. Decide if you would like to share the contents of the list with other users, and click the *Submit* button.

You can also create a temporary list from search results, but you then have to create a permanent list and add the contents of your temporary list to the permanent list. From a search results page click on *Add to my list* .


8.
Say "ahhh!" : Dora goes to the doctor
Beinstein, Phoebe. c2008.
Call number: EPB DOR
1 of 1 copy available at Fort Nelson Public Library.
Place Hold
Add to my list
Reviews & More

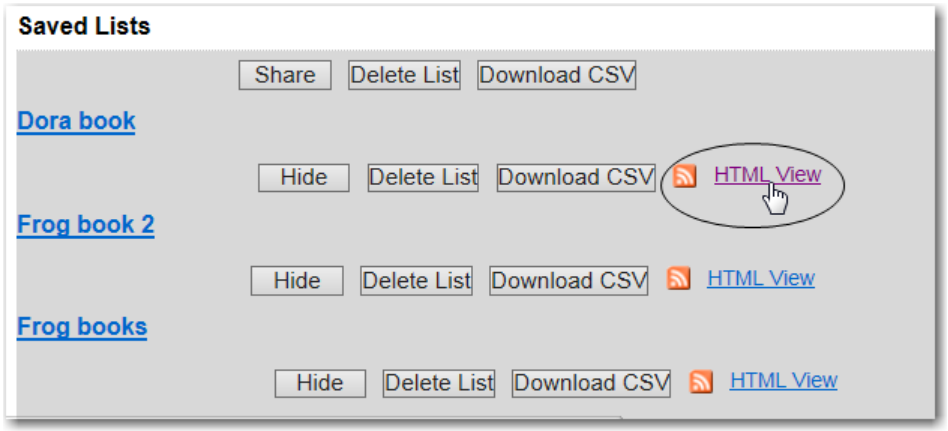
Click on *View My List* at top of search results page. If you are not already logged in, you will be prompted to do so. Create a new list as described above. Select the titles in the temporary list, then click on the drop-down menu labeled *Actions for these items* and make the appropriate choice.



What does "Share this list" mean?

Lists can either be *private*, and only viewable by you, or *public*, and viewable by anyone who knows where the list resides. By default, all lists are private, and you must explicitly instruct the system to allow others to view the contents of a list. You can choose to share a list by clicking *Share* beside the list name. You can un-share a list by clicking *Hide.*

You can give the address (URL) of your list to anyone you want to share it with. In the *My Lists* section there is a *HTML View* link for every shared list. Click on that button and bookmark the resulting web page page in your browser or copy and paste the address (URL) to share your list as required.

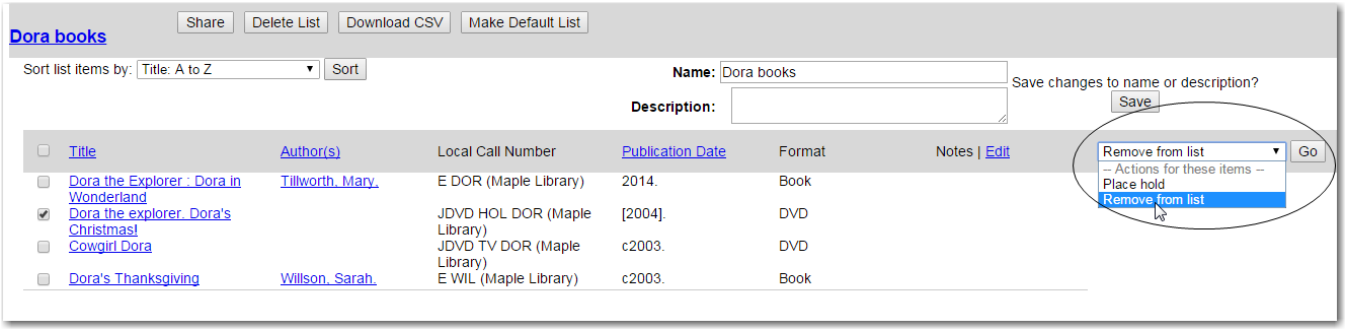


How do I add items to a list?

First, you need to be logged in to the online catalogue by clicking the *My Account* button. Search the catalogue normally for the item you would like to add to your list. Click *Add to My List* and follow the steps as described above in How do I create a list?

How do I remove items from a list?

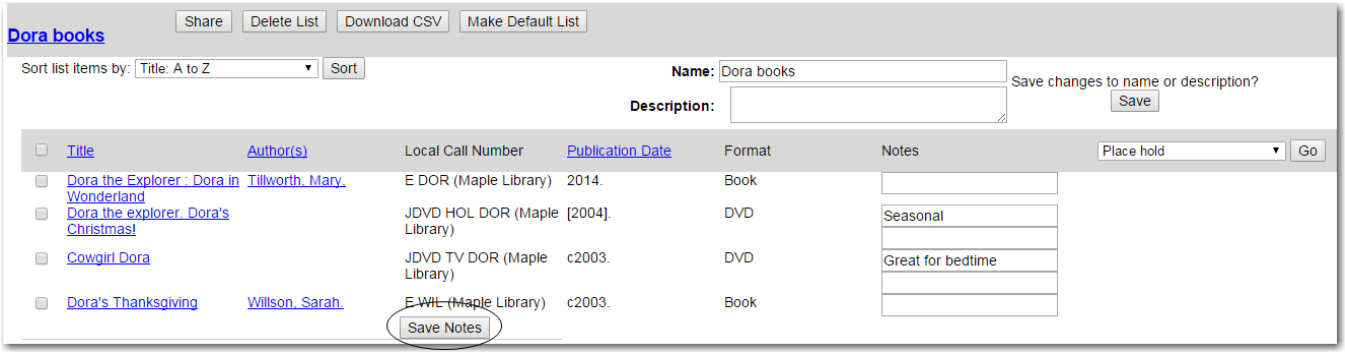
In your account, select the *My Lists* tab. Click on the name of the list you would like to remove the item from. The items in the list will appear. Select the item you would like to remove from the list, click on *Actions for these items*, select *Remove from list* and click *Go*.



Managing items in a list

You can place a hold on an item from your list by selecting the item, and choosing *Place hold* in *Actions for these items* menu.

You can annotate your lists by using the *Notes* feature. Click on one of your lists to open it and display the contents. A *Notes* column will appear, with an *Edit* hyperlink beside it. Click *Edit*, enter your note and click *Save Notes*. Your note will display in your view of your list. If the list is shared, the note will also display in title record on the webpage used to access your shared list.

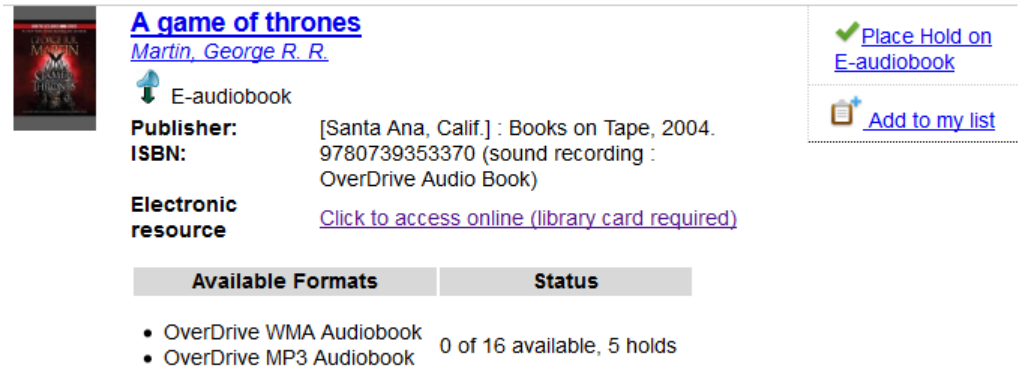


You can export your list to a comma delimited file by selecting *Download CSV* and following your computer's prompts to save the file on your computer.

Chapter 23. Integrated Electronic Resources

Electronic resources are usually hosted by separate suppliers outside the library. Most of these resources have records in the library catalogue. Links leading to the suppliers' website are provided in these records. Some electronic resources can be integrated into the library catalogue, which allows users not only to view the records, but also to borrow and place holds on the resources on the library catalogue directly. Currently e-books and e-audio books from OverDrive are integrated. Users can borrow or place holds on these e-resources, and view their borrowed or on-hold items in their library account.

When your search result includes an integrated e-book or e-audiobook from OverDrive, you may see the record is marked as electronic resource with a link going to the supplier's website.You will see two columns for *Available Formats* and *Status*. You may also see *Place Hold on E-book/E-audiobook*, or *Check Out E-book/E-audiobook*, depending on whether there is an available copy, instead of the *Place Hold* option on the right hand side of the results list.

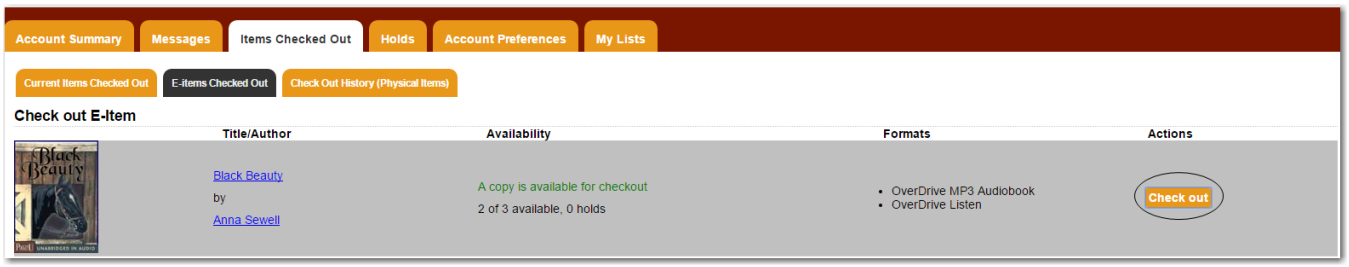


If you have already logged into your account when you do a search, you may see *Go to E-items on Hold* in a title on which you have placed a hold or *Go to E-items Checked Out* in a title already checked out to you. Clicking those links takes you to your account to view those items.

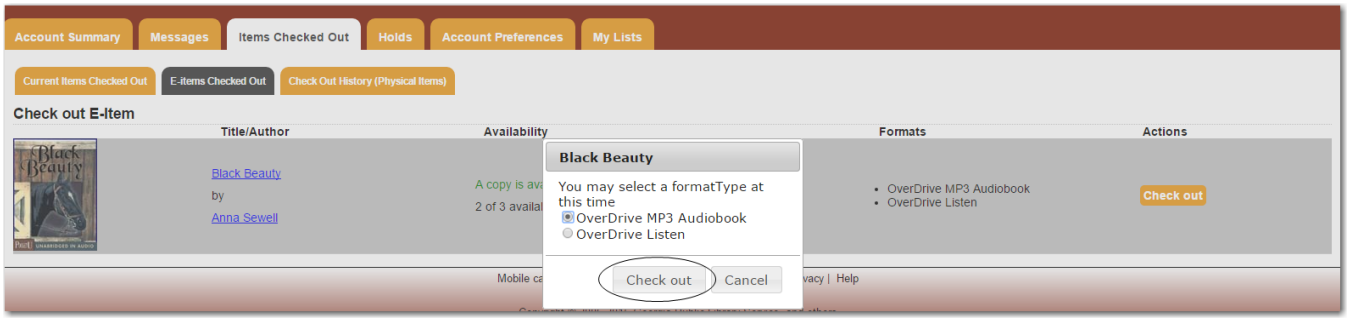
23.1. Check out e-resources

If there is an available copy under a title, you can click on *Check Out E-book/E-audiobook* on the search result list or record details screen. You will be prompted to log in with your library account, if you have not already done so.

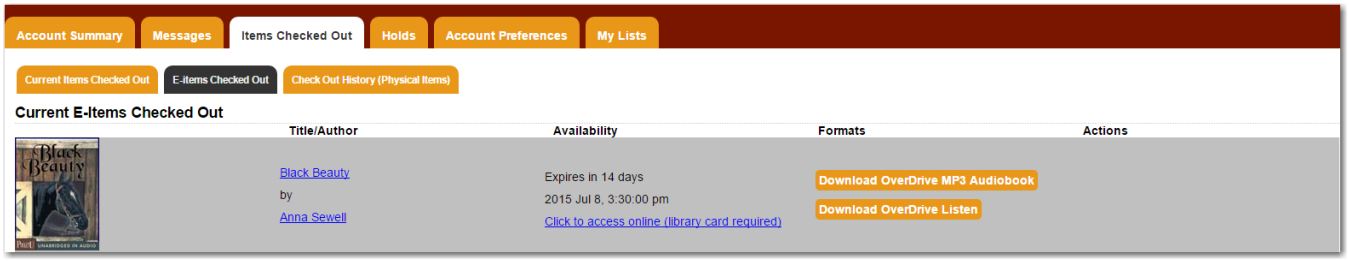
After logging in, click on the *E-Items Checked Out* tab in *My Account*. Click the *Check out button.*



Choose a format type and click *Check out* on the prompt. A successful message will be displayed which will be closed automatically. Click the *Download* button in Format column to download it.



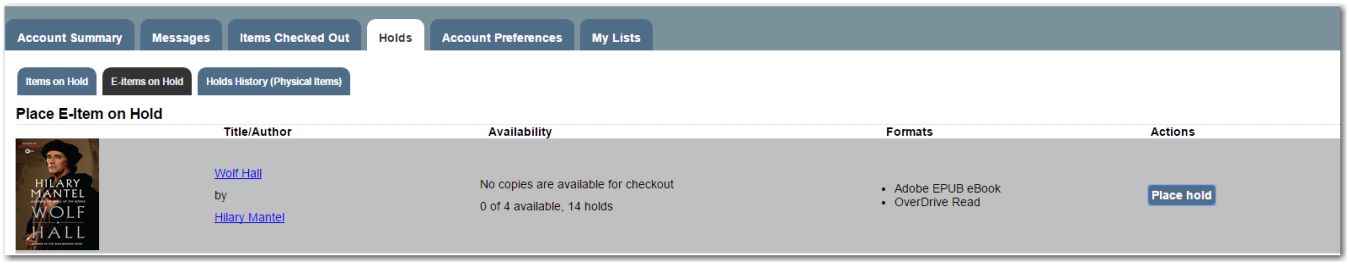
The current *E-items Checked Out* screen is displayed with the due date/time.



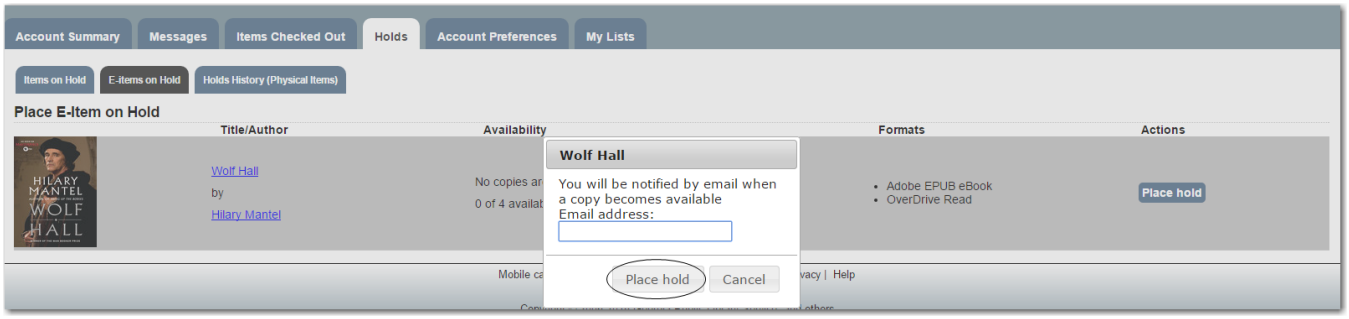
23.2. Place hold on e-resources

If all copies under a title are checked out, you will see a *Place Hold on E-book/E-audiobook* link on the result list or record details screen. Click that link to login to your account, if you have not already done so.

After you log in, you will be directed to the following screen.

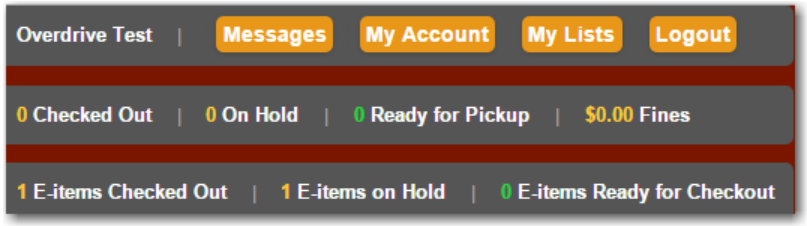


Click *Place Hold* and enter your email address. This address will be kept in the hold record at OverDrive separate from your library account. If you wish to use another email account to receive notification after holds have been placed, you need to update it in every pending hold. Click *Place Hold* again. Once the hold is placed you will receive a confirmation message and the *E-items on hold* screen will be displayed.



23.3. Checked out and on-hold e-resources in *My Account*

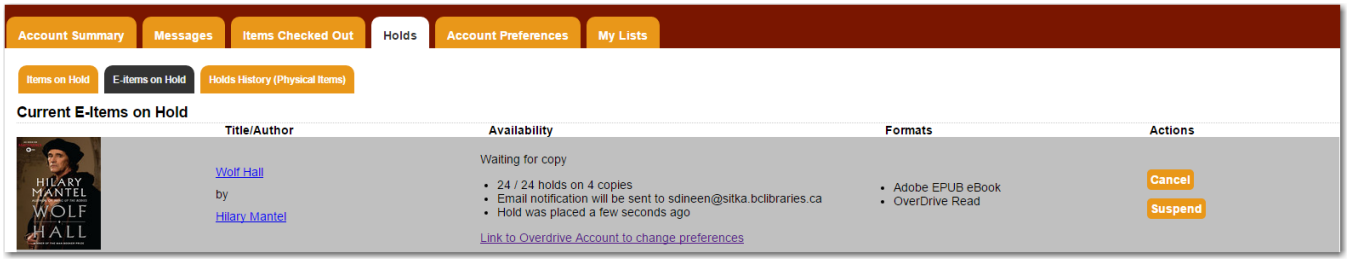
You may view e-resources currently checked out to or on hold for you after you log into your account. The summary is displayed at top right of your screen.



Click the *E-items Checked Out* tab to view the titles you have checked out and download a copy from there.

Click the *E-items on Hold* tab to cancel an unwanted hold, check out a ready-for-pickup hold or suspend a pending hold. Just click the respective buttons and follow the on screen prompts.

When suspending a hold, you have the option to suspend it for a limited period or indefinitely until you activate it again.

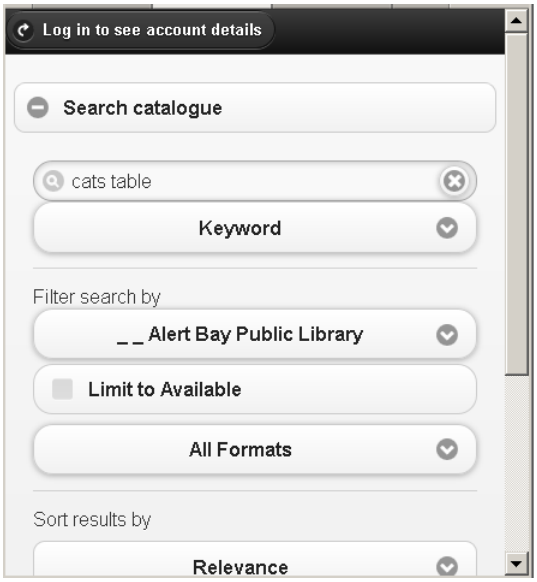


If you wish to update the email address for hold notifications, you need to do it on OverDrive's website. Click on*Link to OverDrive Account to Change Preferences* to access those settings.

OverDrive allows users to keep some preference settings, such as preferred loan period. These preferences can be set up or updated on OverDrive's website only.

Chapter 24. Mobile PAC

The Mobile PAC is designed for users with mobile or smaller screen devices (eg. smart phones, tablets) as well as for users with dial-up or slower connections. You can search the catalogue using the Mobile PAC as well as log into *Your Account* to manage items checked out, items on hold, and fines. You can also place holds using the Mobile Catalogue. A link called Mobile Catalogue at the bottom of the catalogue provides access to the Mobile PAC.



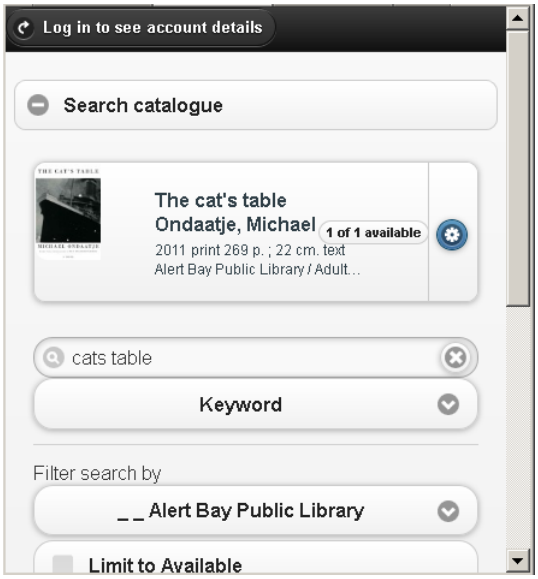
24.1. Searching the Mobile PAC

1. Click on the *Mobile Catalogue* link at the bottom of the OPAC.

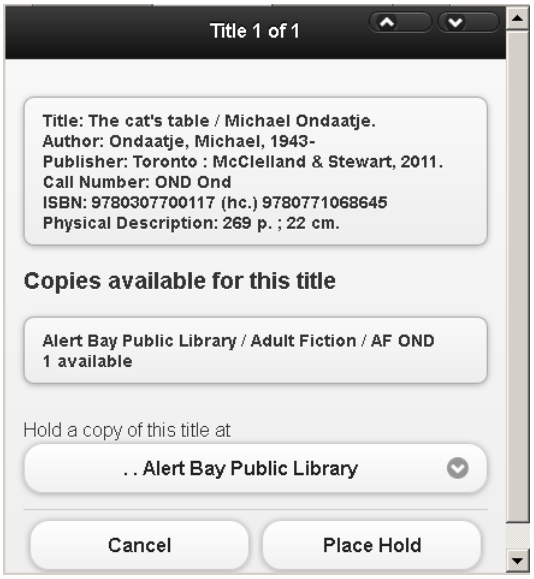
2. The Mobile PAC provides a search box with a drop down to choose the desired index to search: keyword, title, author, subject or series.

3. Enter your search term. You can also set your search parameters such as library or branch, availability, format, and sorting. Click on *Search* after you have entered your search term(s).

4. The search result screen shows the search results including availability, location, call number and cover images when available.



5. Click on the title for more detailed information and to place a hold on the item.

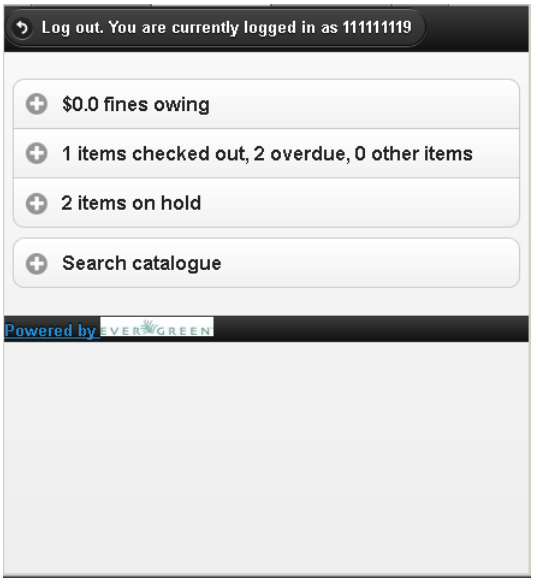

Title 1 of 1
Title: The cat's table / Michael Ondaatje.
Author: Ondaatje, Michael, 1943-
Publisher: Toronto : McClelland & Stewart, 2011.
Call Number: OND Ond
ISBN: 9780307700117 (hc.) 9780771068645
Physical Description: 269 p. ; 22 cm.
Copies available for this title
Alert Bay Public Library / Adult Fiction / AF OND
1 available
Hold a copy of this title at
. . Alert Bay Public Library
Cancel
Place Hold

24.2. Mobile PAC Account Information

1. Choose *Log in to see account details* at top of the page to log into your account.

2. Login in with username (or barcode) and password.

3. You can work in 4 views: fines owing, items checked out including a summary of overdue items, holds placed, and search the catalogue. Clicking on any of the tabs will expand the view. In the expanded view of items checked out you can renew items, and in the expanded view of holds you can cancel or suspend holds.


Log out. You are currently logged in as 111111119
$0.0 fines owing
1 items checked out, 2 overdue, 0 other items
2 items on hold
Search catalogue
Powered by EVERGREEN

Part V. Reports

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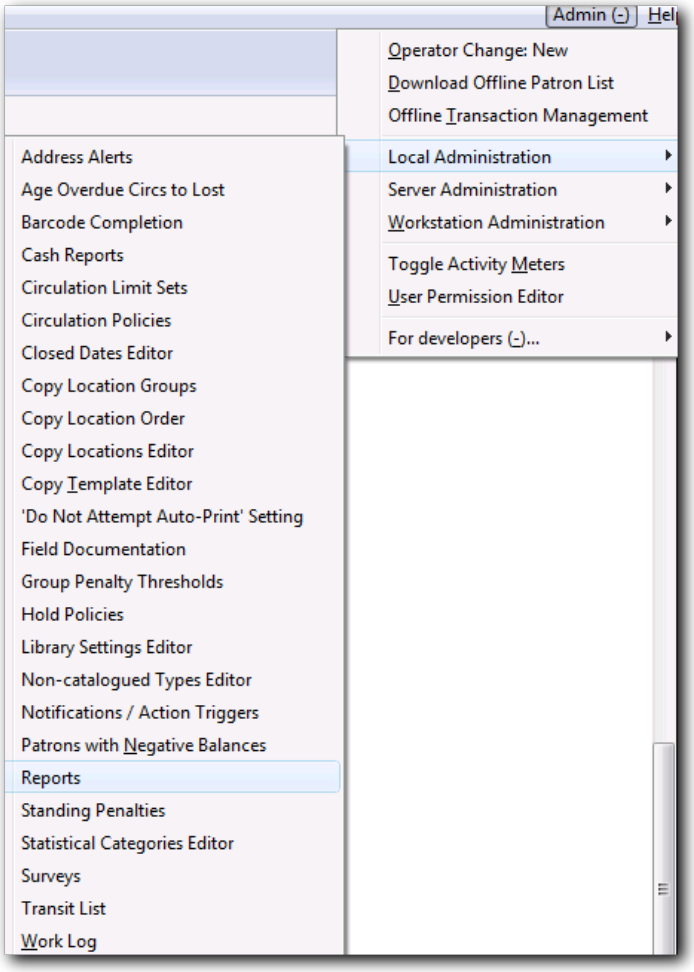
Chapter 25. Reports overview

The Reports interface is accessed from the *Admin* menu, under *Local Administration* → *Reports*.



Only users with reporting permissions (granted by Sitka Support on libraries' request) can access the Reports interface, but the output can be visible to all staff accounts. Reports are owned by the account used to create them, though the owner can allow other people to view and copy (template only) them if he/she shares them with other staff in the library, other libraries in the federation, or the whole Sitka Consortium.

Evergreen has very powerful reporting functionalities. It is possible to report on almost every field in every table in the database. Connections between tables are pre-made on the Reports interface. Some views are also provided to group together records meeting certain conditions. For details refer to Commonly used tables and views in Evergreen Database.

The ultimate goal of reporting is finding the records in the database which meet the requirements. Sometimes the result records are processed to some extent before they are included in the output, such as counting and displaying the count of the records found instead of showing the records themselves. The requirements include two parts: the conditions used to extract the records and the information to be displayed in the result file.

Evergreen is designed to achieve the above goal by creating a template first. The template specifies the fields to be displayed in the result file (Displayed Fields) and the fields on which conditions can be applied (Filter Fields).

For example, in an overdue template, Due Date in the circulation record should be a filter field so that a date can be given in order for the reporting program to compare and decide whether a checkout is overdue; while patron's names may be displayed fields so that staff may know who has the overdue item. In short, a template simply contains a list of displayed fields and a list of filter fields. The template can be used for multiple times. For example, the afore-mentioned overdue template can be used to run a report to capture circulation records with Due Date before 2012-01-01. It can also be used to capture circulations with Due Date before 2012-02-15.

Once a template is ready, the next step is assigning values to the filter fields, for example, giving 2012-01-01 to the Due Date field. This process is commonly known as defining a report, or running a report or setting up a report. The process also schedules the report's run-time and frequency (one time only or on regularly basis), selects the result file format(s) and designates output file receivers, if preferred. The information provided during this step is saved in a file called "Report" on Evergreen. This file contains the template information and the value for each filter. Unfortunately, most of these contents are neither viewable nor editable after the file is saved.

When a report starts to run, the program goes through the database and gathers the records that meet the conditions into a file in the selected format(s). This is the Output file that contains the result records.

The three types of files created during the above procedure need to be kept separately in different folders on the Reports interface. Before anything, you must create at least one *Template*, *Report*, and *Output* folder as described in Chapter 26, *Folders*.

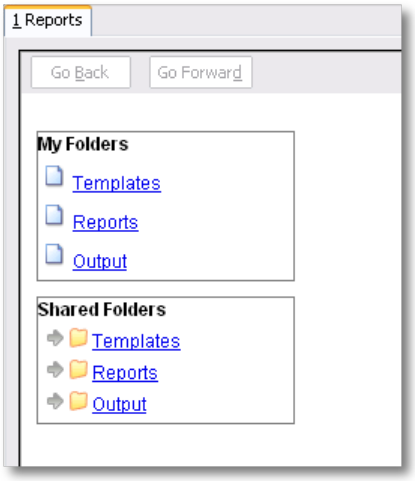
This chapter focuses on the movements on the Reports interface while demonstrating how to create reports in Evergreen. Once you understand how to navigate around the Reports interface, you can create your own reports from scratch or take advantage of Sitka's pre-packaged report templates. Some background knowledge of Evergreen database and database terminology are at the end of this chapter.

Chapter 26. Folders

There are three main components used on the Reports inferface: *Templates*, *Reports*, and *Output*. Each of these components must be stored in a folder. Folders can be private (accessible to your login only) or shared with other staff at your library, other libraries in your federation, or with the whole Sitka Consortium. It is also possible to selectively share only certain folders and/or subfolders.

A shared subfolder must be created in a shared folder. The sharing scope of the subfolder should be within the sharing scope of the parent folder. For example, a subfolder shared with Sitka Consortium should only be in a parent folder shared with Sitka. It should not be in a folder shared with your library only. Though creating shared subfolders in unshared folders or a subfolder with the sharing scope exceeding its parent's is not blocked by Evergreen, serious consequences will be caused by such folders. You must be cautious when creating shared subfolders.

There are two parts in the folders pane. The *My Folders* section contains folders created with your Evergreen account. Folders that other users have shared with you appear in the *Shared Folders* section under the username of the sharing account. You can only view the contents or clone the templates in the shared folders, but not make any change in the shared folders. The cloned template can only be saved into your own folder.

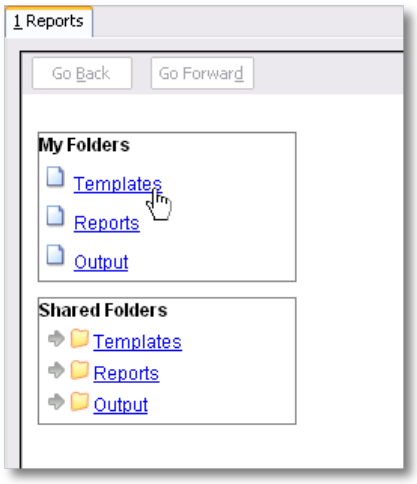


26.1. Creating Folders

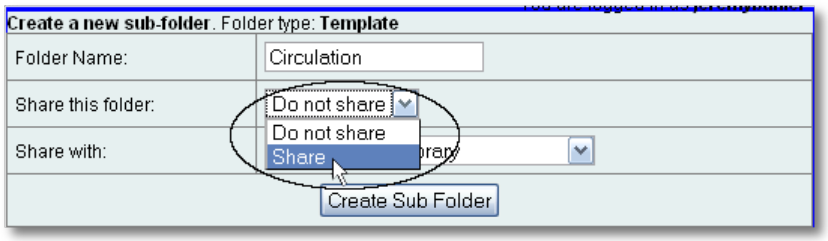
Whether you are creating a report from scratch or working from a shared template you must first create at least one folder.

The steps for creating folders are similar for each reporting function. It is easier to create folders for templates, reports, and output all at once at the beginning, though it is possible to do it before each step. This example demonstrates creating a folder for a template.

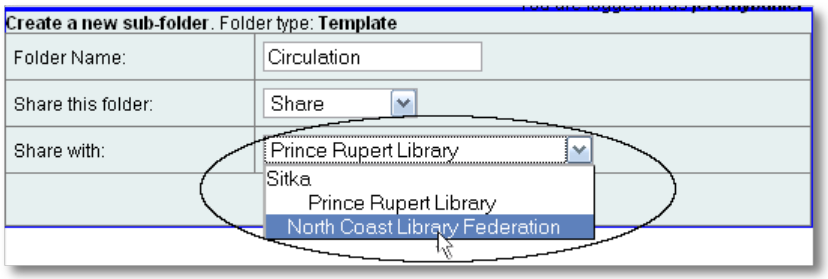
1. Click on *Templates* in the *My Folders section*.



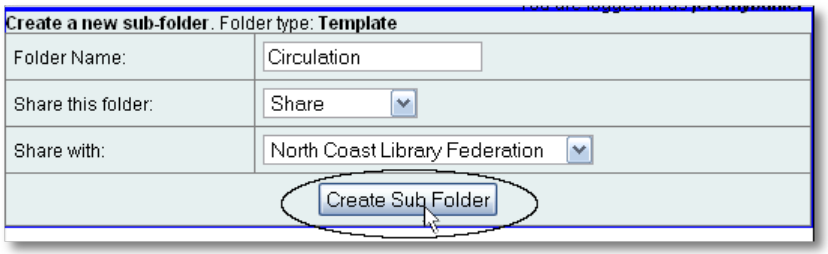
2. Name the folder. Select *Share* or *Do not share* from the dropdown menu.



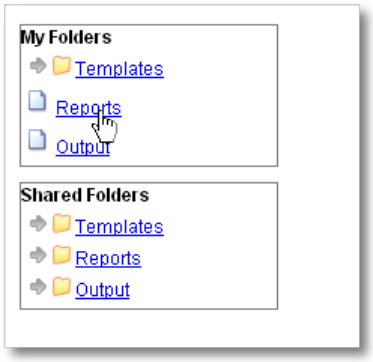
3. If you want to share your folder, select who you want to share this folder with from the dropdown menu.



4. Click *Create Sub Folder*, and then *OK* on the confirmation prompt.

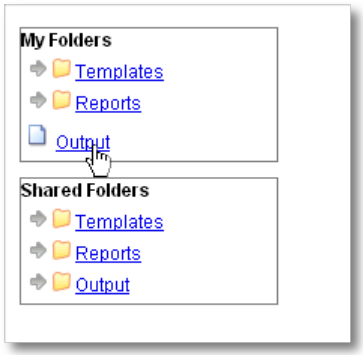


5. Next, create a folder for the report definition to be saved to. Click on *Reports*.



6. Repeat steps 2-5 to create a *Reports* folder also called *Circulation*.

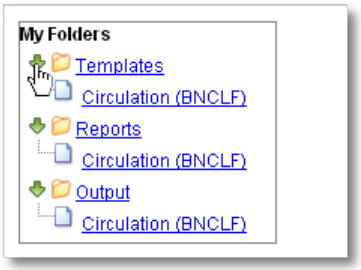
7. Finally, you need to create a folder for the report's output to be saved in. Click on *Output*.



8. Repeat steps 2-5 to create an *Output* folder named *Circulation*.

Using a parallel naming scheme for folders in *Templates*, *Reports*, and *Output* helps keep your reports organized and easier to find.

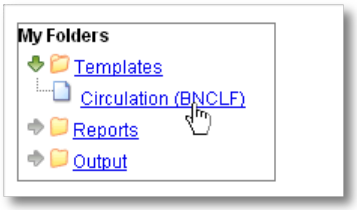
The folders you have just created, will now be visible by clicking the arrows in *My Folders*. Bracketed after the folder name, is the name of with whom the folder is shared. For example, *Circulation (BNCLF)* is shared with the North Coast Library Federation. If it is not a shared folder, there will be nothing after the folder name. You may create as many folders and sub-folders as you like.



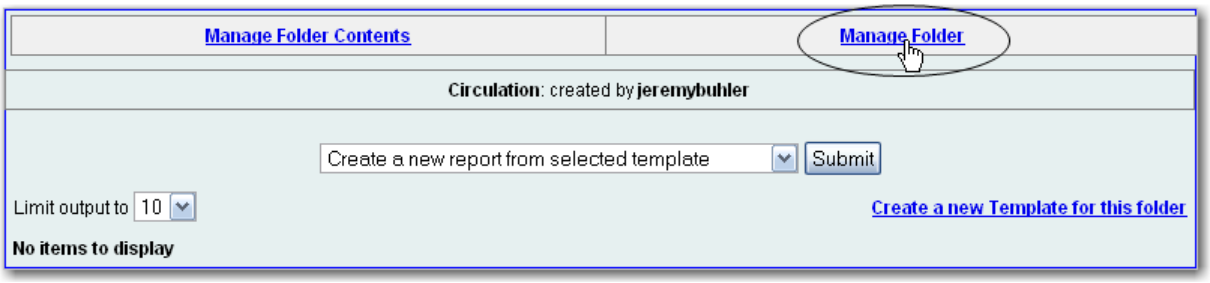
26.2. Managing Folders

Once a folder has been created, you can change the name, delete it, create a new subfolder, or change the sharing settings. This example demonstrates changing a folder name; the other choices follow similar steps.

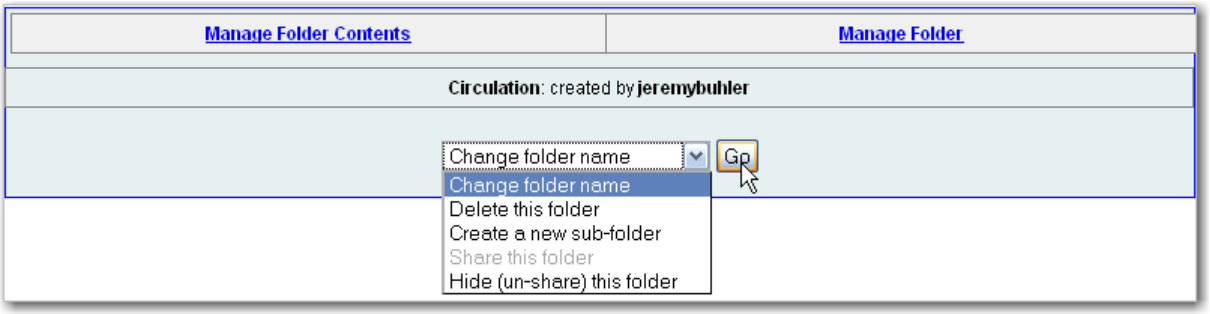
1. Click on the folder that you wish to rename.



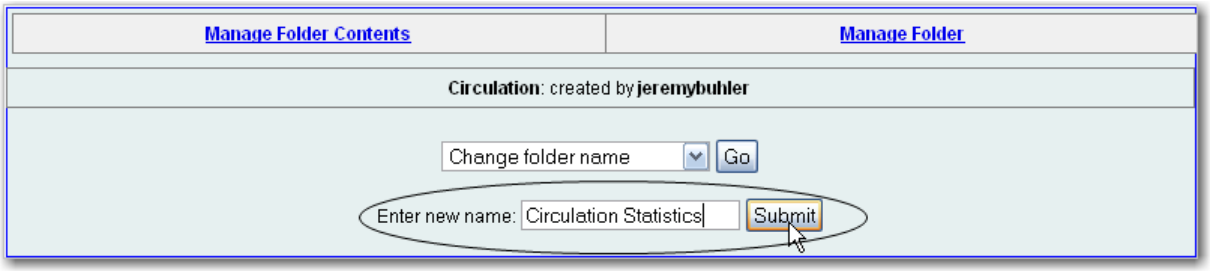
2. Click *Manage Folder*.


Manage Folder Contents
Manage Folder
Circulation: created by jeremybuhler
Create a new report from selected template
Submit
Limit output to 10
Create a new Template for this folder
No items to display

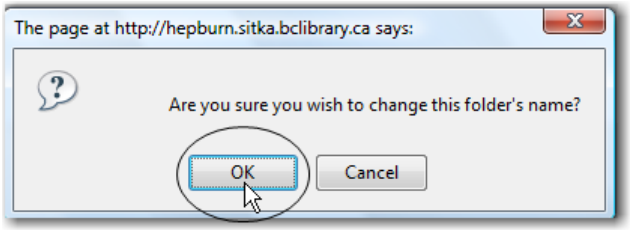
3. Select *Change folder name* from the dropdown menu and click *Go*.



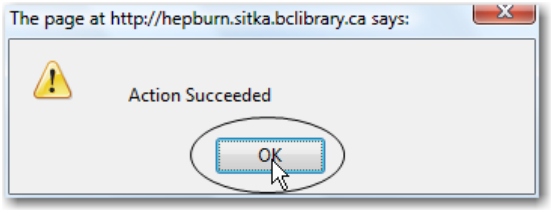
4. Enter the new name and click *Submit*



5. Click *OK*.



6. You will get a confirmation box that the Action Succeeded. Click *OK*.



Chapter 27. Creating Templates

Once the folders are ready, you can create or clone a template. Templates allow you to run a report more than once, without building it anew every time by changing definitions (such as values for the filters) to suit current requirements. For example, a template counting patrons with a registration date within a time frame can be used to find out the number of patrons registered within the last month or the last ten days. Another example is a shared template that reports on circulation statistics at a given library. This can be used by other libraries by selecting their own library as the circulating library when they run the report.

Creating a template is complex. It requires some understanding of the Evergreen database and how Evergreen handles various records when performing tasks on the staff client. You may refer to the last section of this chapter for some background knowledge. Bear in mind, that a template includes a list of displayed fields, the information you will see in the result, and a list of filter fields which enables you to set up the conditions for your target records. Generally you do not record your conditions in the template. For example, in an overdue template, you do not record 2012-01-01 as the due date. Instead, you just make the Due Date field in the circulation record as a filter field. When setting up the report with this template, you will be given the chance to put in 2012-01-01 as the due date.

It can be useful to plan out your report on paper before getting started with the reporting tool. The first thing to decide is the source table. You can choose only one starting source table for each template. If you need information from other tables, follow the link in the source table to those tables. Grouping together related fields and identifying the key fields will help you select the correct *source*.

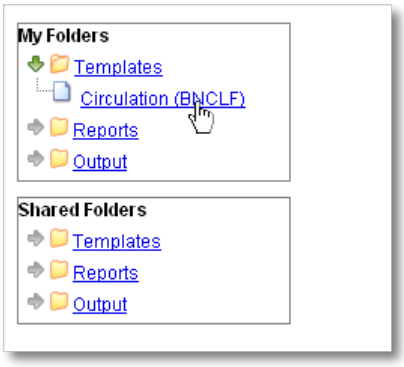
We will take a report on circulation statistics as an example to show you how to create the template. In circulation statistic reports, libraries usually want to know how many circulations were done within a selected time period. When an item is checked out on the staff client, a record is created in the circulation table. You want a count of the number of circulation records created within the time period. So, the Circulation table is likely the source with which you want to start.

You may wish to break down the number of circulations by items' shelving locations to see the circulations by different types of materials (or the patrons' profile groups). In this case, the count of circulation records and the shelving location (or patron profile) are the potential displayed fields. For the filter fields, you need to limit the circulations done within a time period, so checkout date should be a filter. You probably want to count the circulations done at your library only as you are part of a consortium, or for all the branches of your library system. (In such a case, you may want to see the checkout library in the result, too.) So, the circulating library will be another filter.

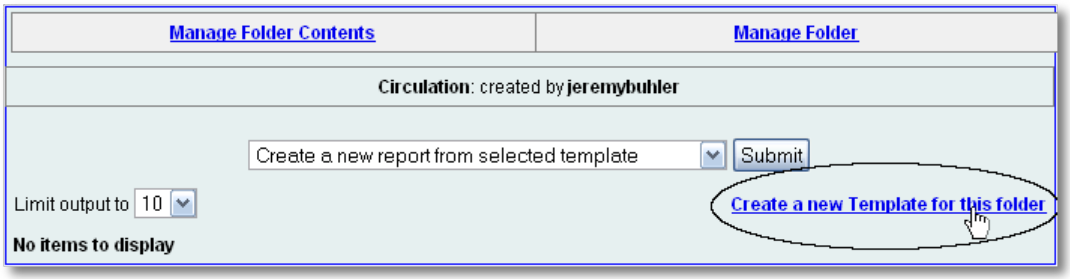
With the above analysis, we will build the template from scratch in the following section to demonstrate the procedure on the template creating screen.

27.1. Choosing Displayed Fields

1. Click on the *My Folder* template folder where you want the template to be saved.



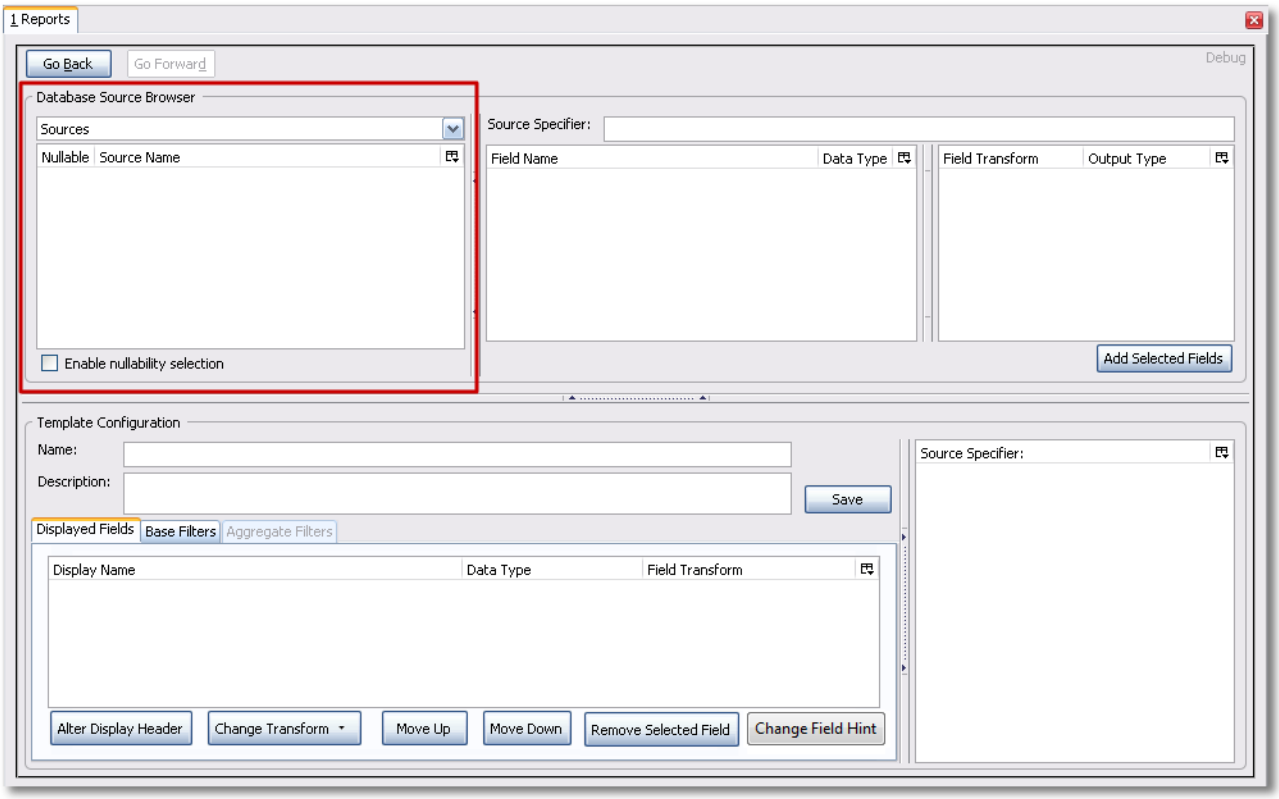
2. Click on *Create a new Template for this folder*.


Manage Folder Contents
Manage Folder
Circulation: created by jeremybuhler
Create a new report from selected template
Submit
Limit output to 10
Create a new Template for this folder
No items to display

3. You can now see the template creating interface. The upper half of the screen is the *Database Source Browser*, where you view the available tables in the database, the fields in each table, and the available transforms for the selected field. You select fields for your template here. The lower half is the *Template Configuration*, which displays your selected *Displayed Fields* and *Base Filters* and/or *Aggregate Filters* in the template.

   We will select the displayed fields for our template first. So make sure *Displayed Fields* is selected.

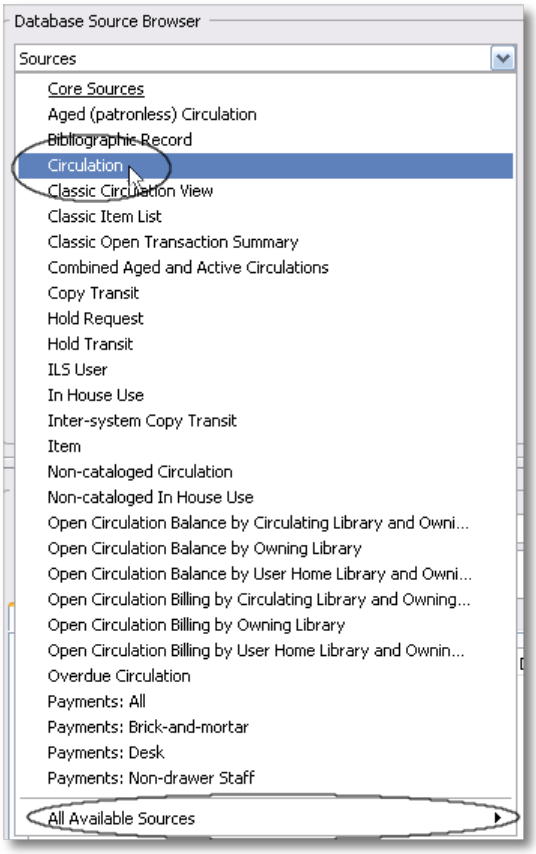
   The top left hand pane contains the database *Sources* drop-down list. This is the list of tables available as a starting point for your template. Commonly used sources are *Circulation* (contains circulation records that may be used for circulation statistics and overdue reports), *ILS User* (contains patron records that may be used for patron reports), and *Item* (contains copy records that may be used for reports on collection or items with special status).



   The *Enable source nullability* checkbox below the sources list is for specifying the join type between linked source tables. In most cases, it should be left unchecked by default. See for how to use *Enable source nullability* checkbox. [319]

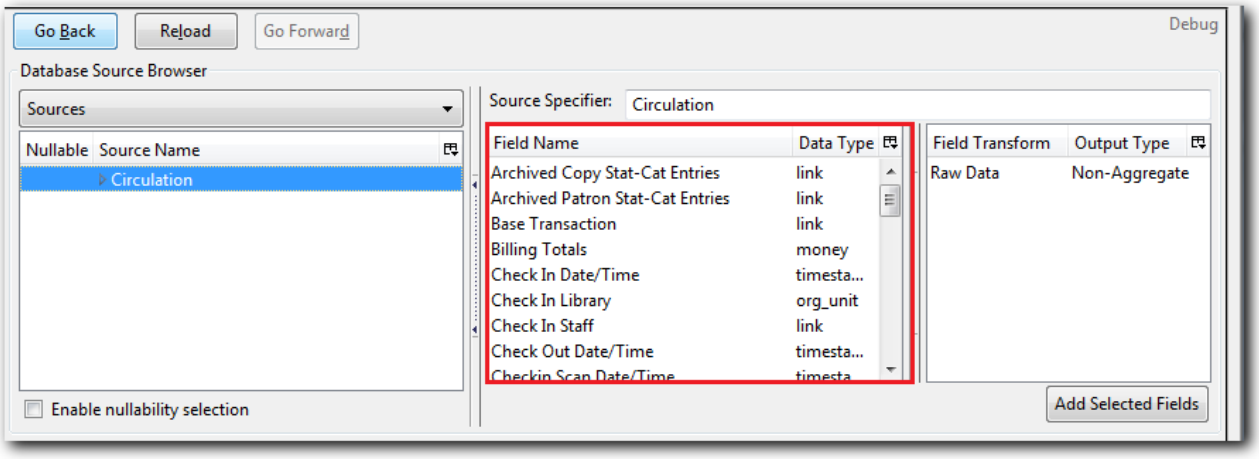
   The relationship between tables can be found by displaying *Relationship* field (using the Column Picker) in the low *Source Specifier* pane.

4. Select *Circulation* in the *Sources* dropdown menu. Note that the *Core Sources* for reporting are listed first, however it is possible to access all available sources at the bottom of this dropdown menu.



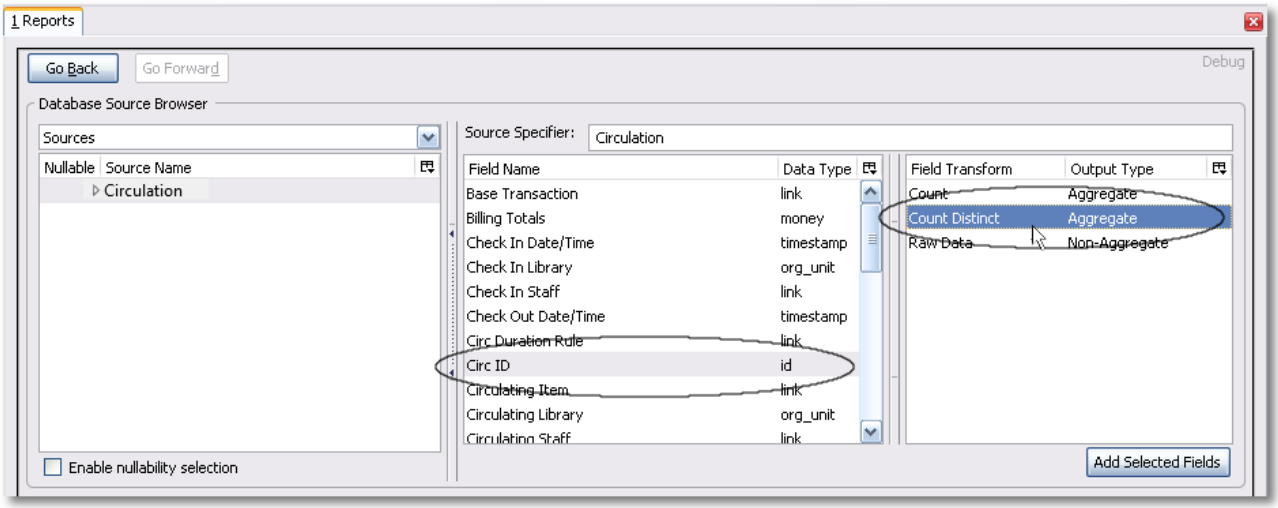
One template can have only one starting source table. If you need information from other tables you should follow the links made by the Reports interface to those tables. The reporting program can not put two pieces of isolated information together into one record in the result. When you change a starting table all your existing selected fields will be removed.

5. Click on *Circulation* to retrieve all the fields and links, which will be displayed in the middle pane. The *Field Name* column contains the label of each field. The *Data Type* column shows what type of data is in the field. For details of data type see Template Terminology. Note that the *Source Specifier* (above the middle and right panes) shows the path that you took to get to the specific field.

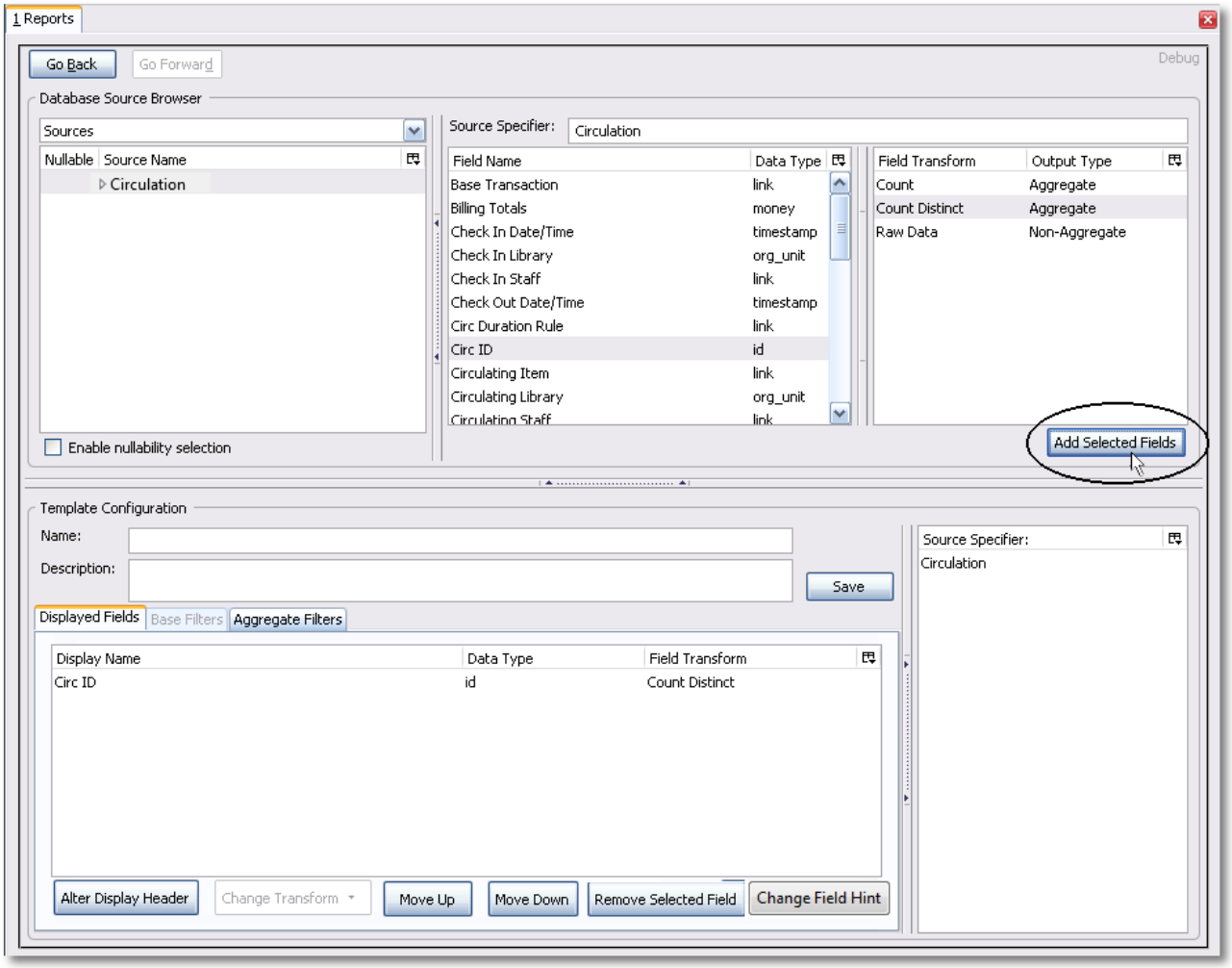


6. When you select a field in the middle pane, the available data transforms of the selected field are displayed in the right pane. Transforms specify how data should be processed before they are displayed/compared. Refer to Template Terminology for details of Transforms for each data type.

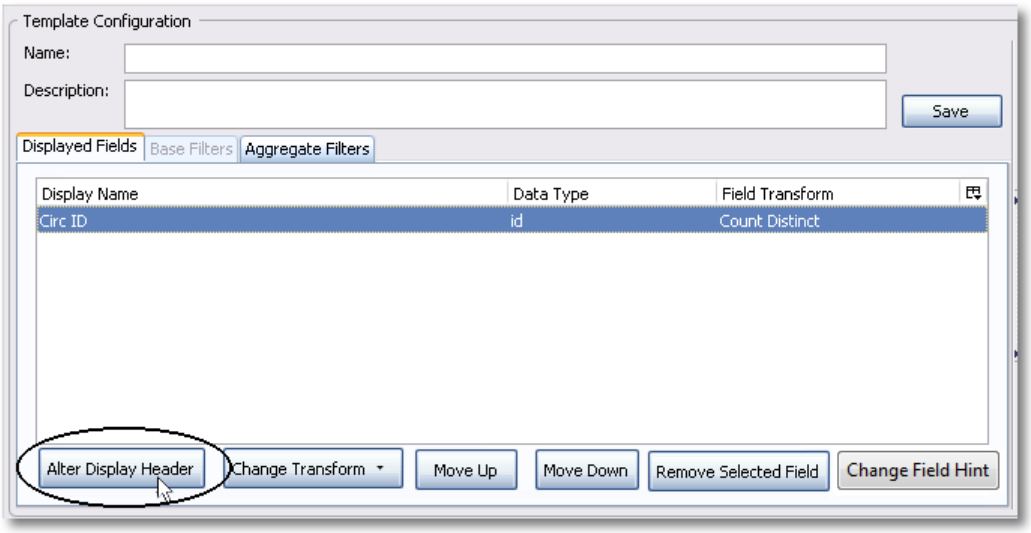
   For our example template, select *Circ ID* in the middle *Field Name* pane, and *Count Distinct* from the right *Field Transform* pane. You are counting the number of circulation records.



7. Click *Add Selected Fields* underneath the *Field Transform* pane to add this field to your report output. Note that *Circ ID* now shows up in the bottom left hand pane under the *Displayed Fields* tab.

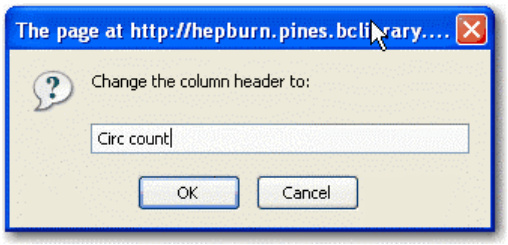


8. *Circ ID* will be the column header in the report output. You can rename default display names to something more meaningful. To do so in this example, select the *Circ ID* row and click *Alter Display Header*.



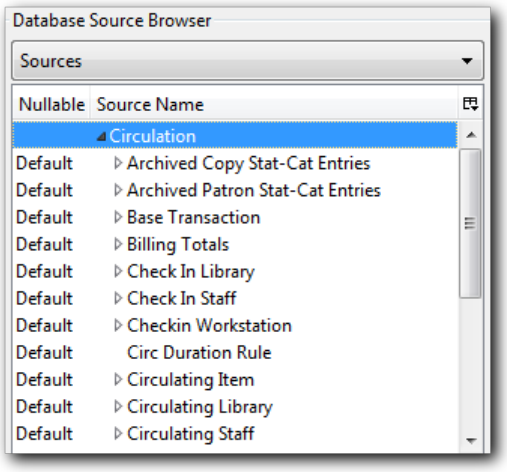
Double-clicking on the displayed field name is a shortcut to altering the display header.

9. Type in the new column header name, for example *Circ count* and click *OK*.

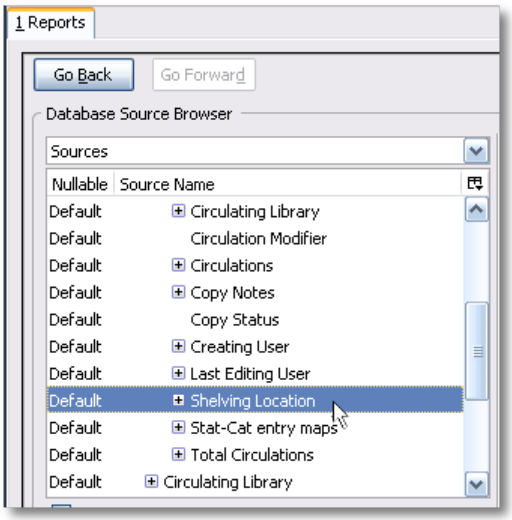


10. Add other data to your report by going back to the *Sources* pane and selecting the desired fields. In this example, we are going to add *Circulating Item* → *Shelving Location* to further refine the circulation report.

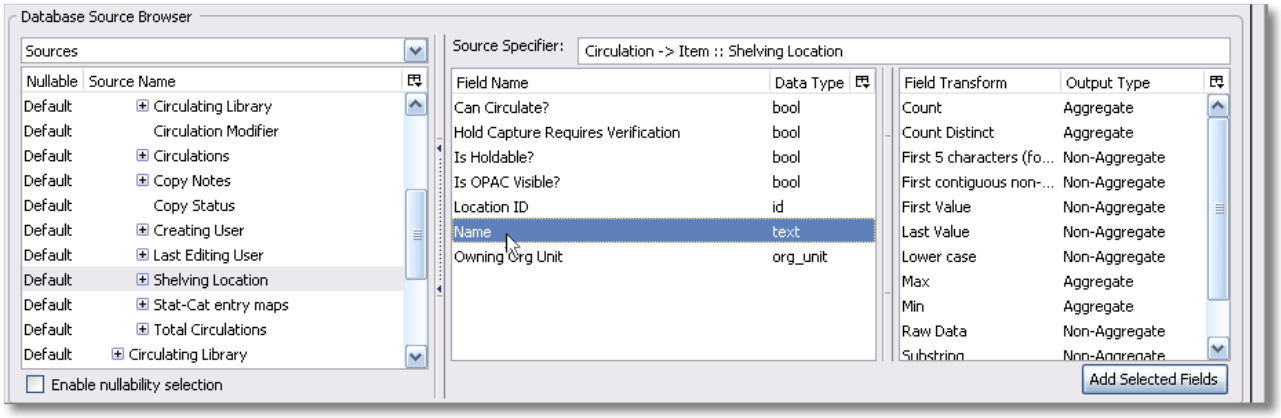
In the top left hand *Sources* pane, expand *Circulation*. Depending on your computer you will either click on the + sign or on an arrow to expand the tree.



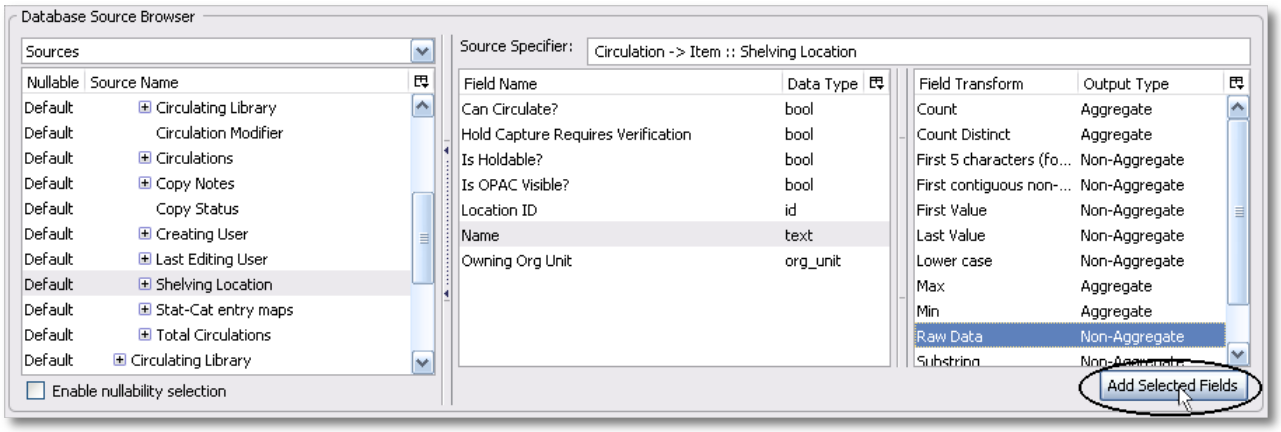
11. Click on the + or arrow to expand *Circulating Item*. Select *Shelving Location*.



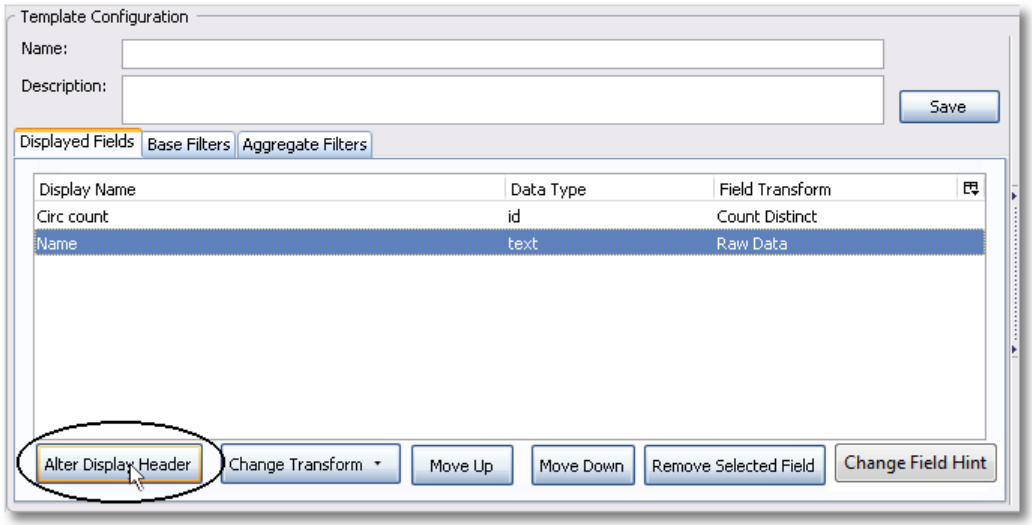
12. In the *Field Name* pane select *Name*.



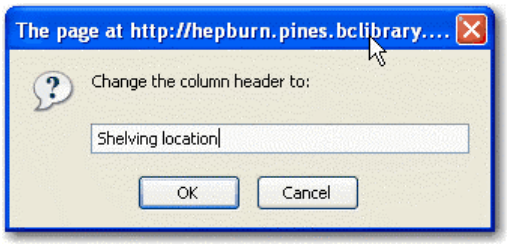
13. In the upper right *Field Transform* pane, select *Raw Data* and click *Add Selected Fields*. Use *Raw Data* when you do not wish to transform field data in any manner.



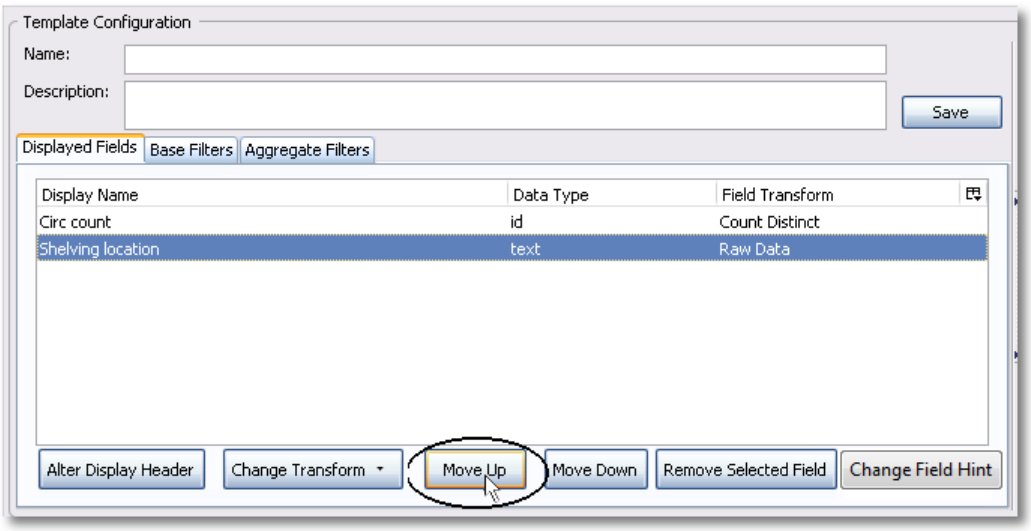
14. *Name* will appear in the bottom left pane. Select the *Name* row and click *Alter Display Header*.



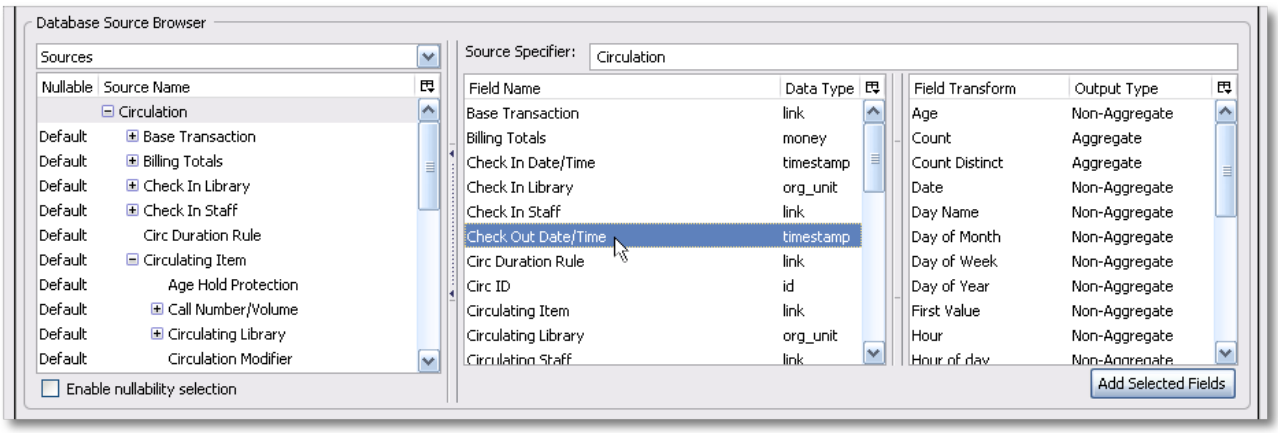
15. Enter a new, more descriptive column header, for example, *Shelving location*. Click *OK*.



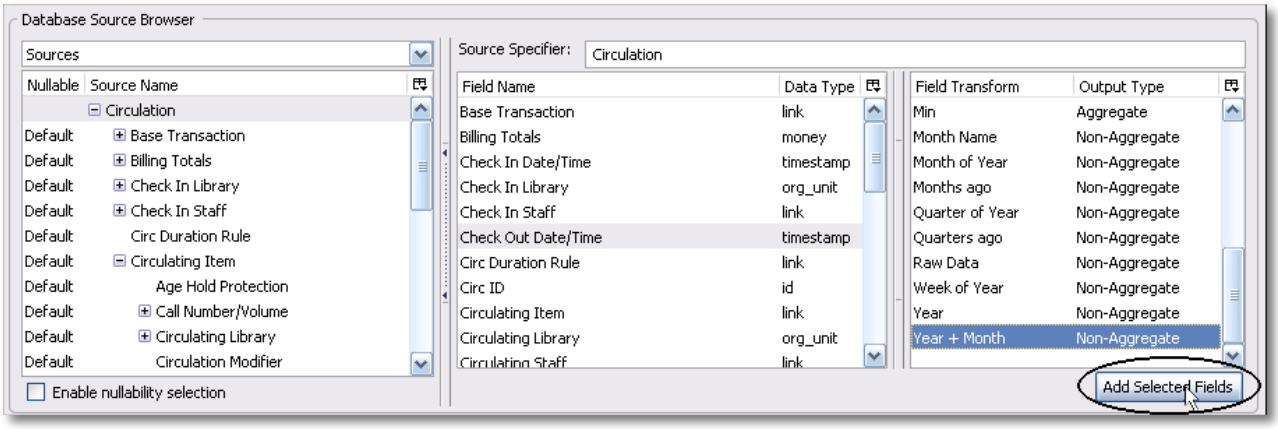
16. Note that the order of rows (top to bottom) will correspond to the order of columns (left to right) on the final report. The results will be sorted by the columns in this order, too. Select *Shelving location* and click on *Move Up* to move *Shelving location* before *Circ count*. The result will be sorted by Shelving Location first.



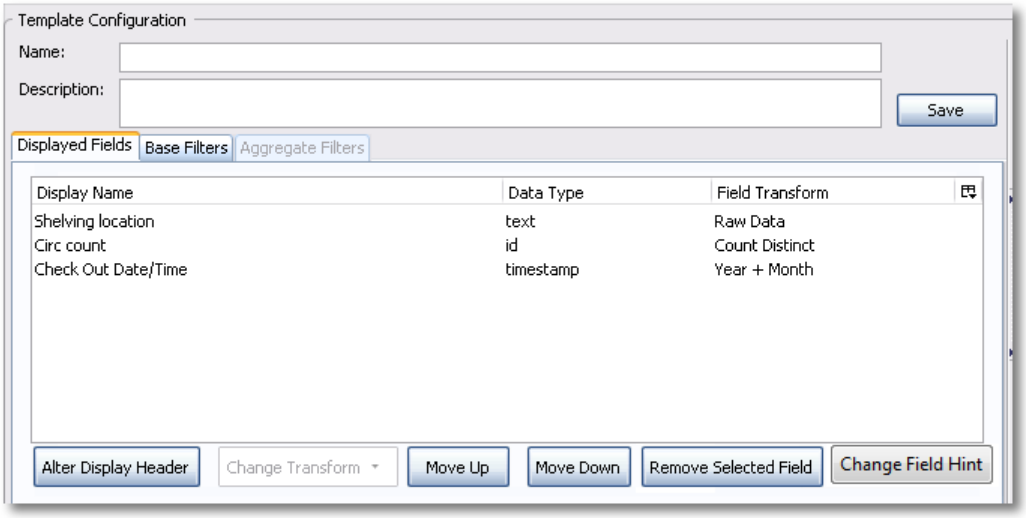
17. Return to the *Sources* pane to add more fields to your template. Under *Sources* click *Circulation*, then select *Check Out Date/Time* from the middle *Field Name* pane.



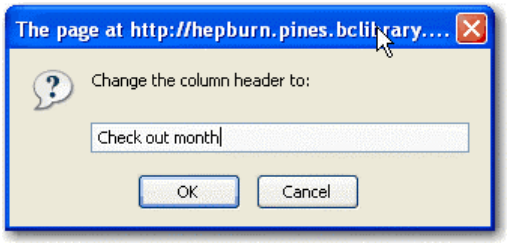
18. Select *Year + Month* in the right hand *Field Transform* pane and click *Add Selected Fields*



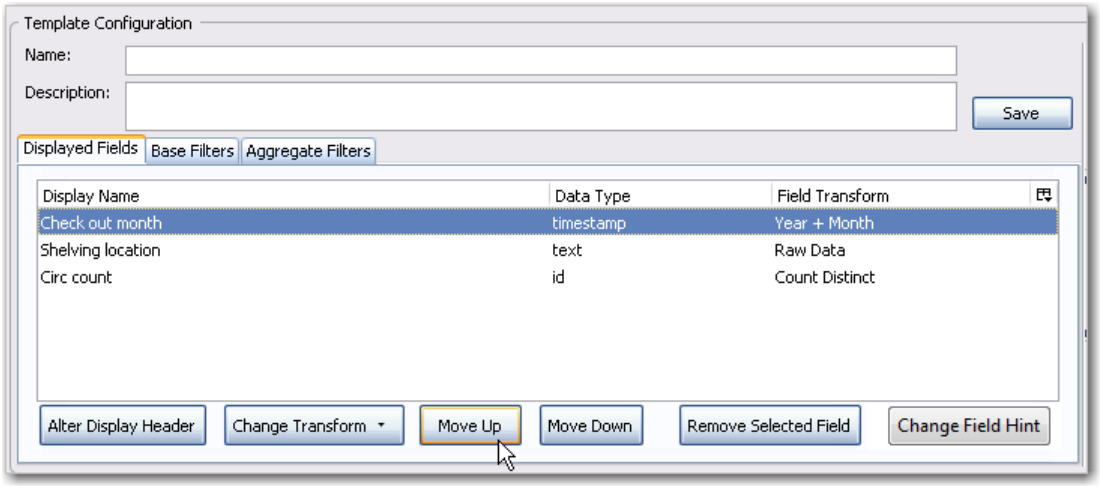
19. *Check Out Date/Time* will appear in the *Displayed Fields* pane. In the report it will appear as a year and month (YYYY-MM) corresponding to the selected tranform.



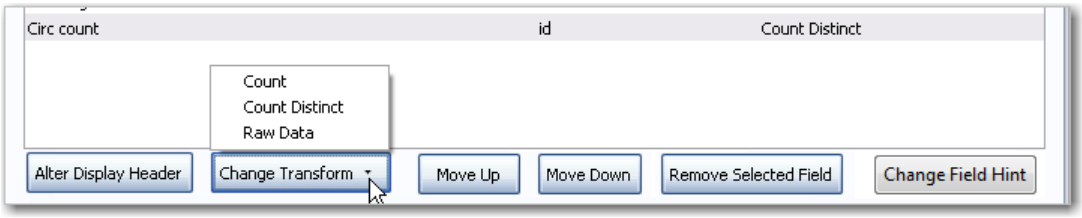
20. Select the *Check Out Date/Time* row. Click *Alter Display Header* and change the column header to *Check out month*.



21. Move *Check out month* to the top of the list using the *Move Up* button, so that it will be the first column in an MS Excel spreadsheet. Now, the report output will sort by the checkout month first, then by shelving locations.



Note the *Change Transform* button in the bottom left hand pane. It has the same function as the upper right *Field Transform* pane for fields that have already been added.



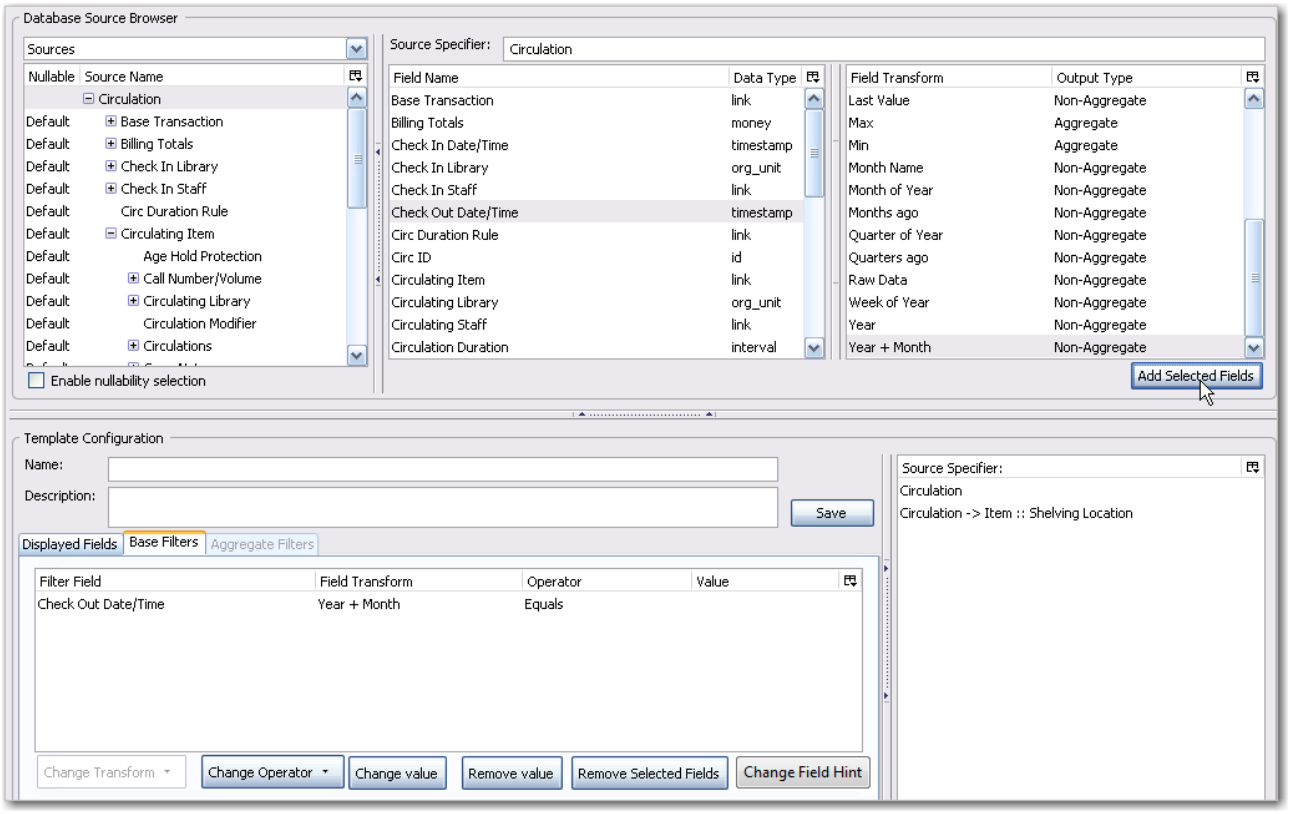
27.2. Applying Filters

Without filters, all records in the database will be in the result, which is seldom desired, especially in Sitka's context where libraries share the same database. So some filters should be applied to keep out the unwanted records.

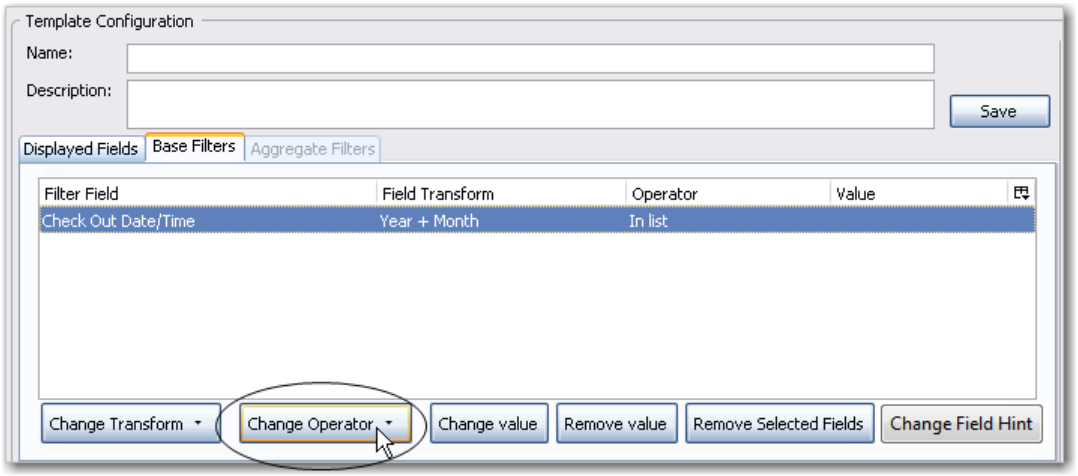
The following procedure shows how to add filters to the example template:

1. Select the *Base Filters* tab in the bottom *Template Configuration* pane.

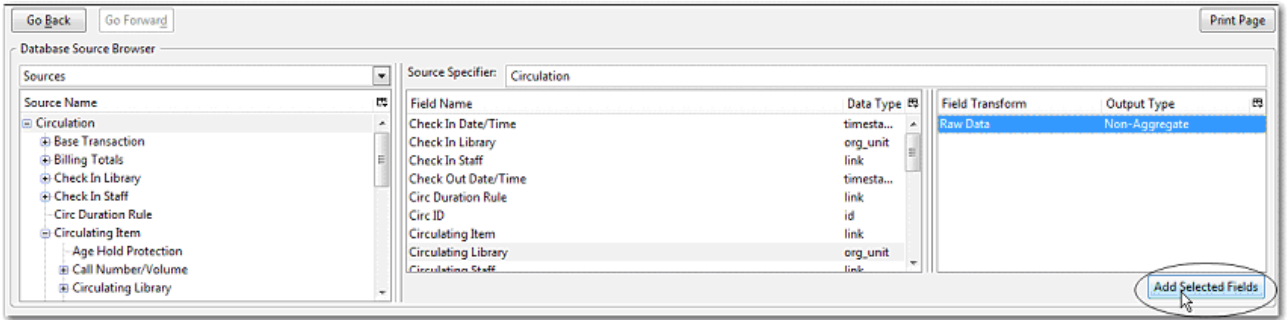
2. For this circulation statistics example, select *Circulation* → *Check Out Date/Time* → *Year + Month* and click on *Add Selected Fields*. You are going to filter on the checkout month.



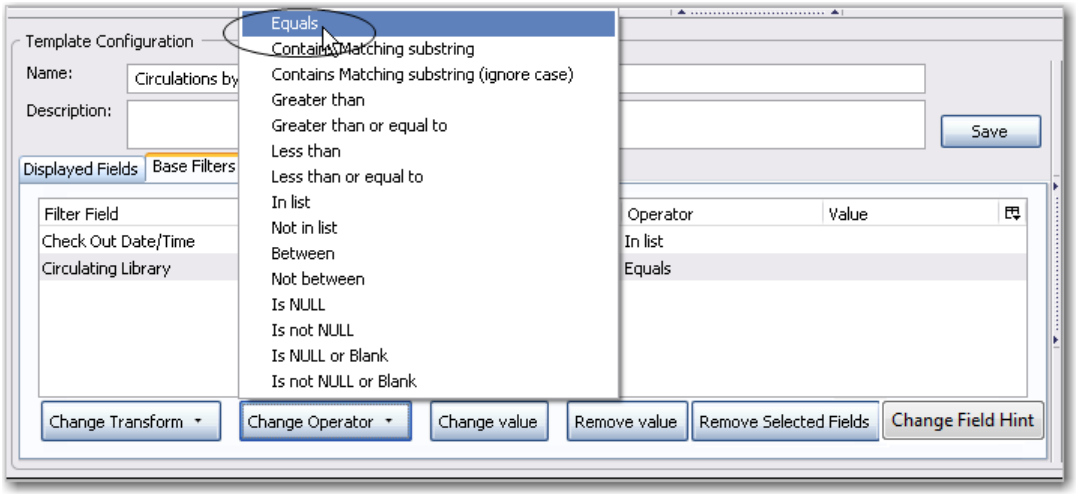
3. Select *Check Out Date/Time*. Click on *Change Operator* and select *In list* from the dropdown menu. This operator allows you to count circulations done within each month for several months by just one report.



4. To filter on the location of the circulation select *Circulation* → *Circulating library* → *Raw Data* and click on *Add Selected Fields*.



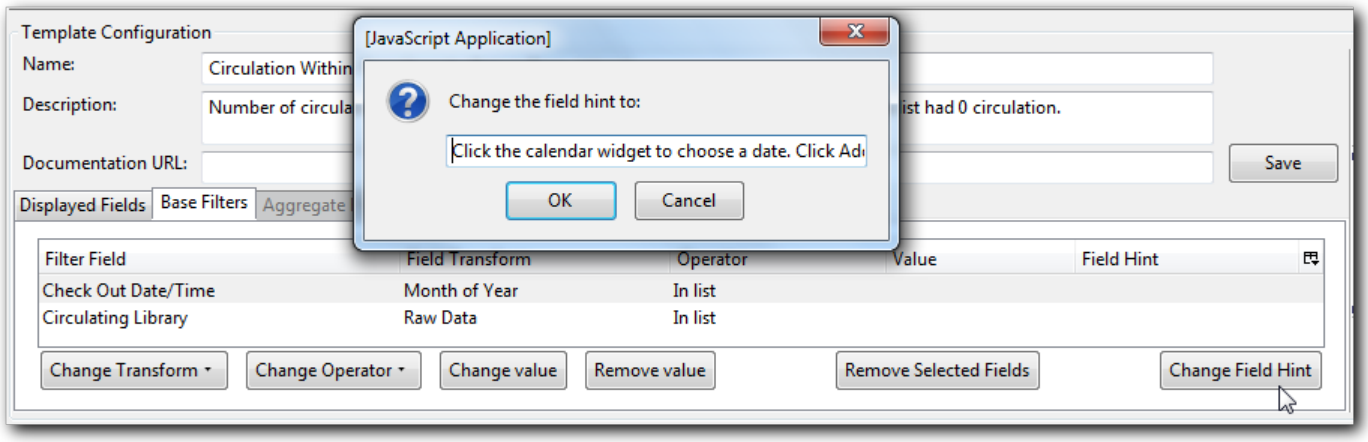
5. Select *Circulating Library* and click on *Change Operator* and select *Equals*. Note that this is a template, so the value for *Equals* will be filled out when you run the report.



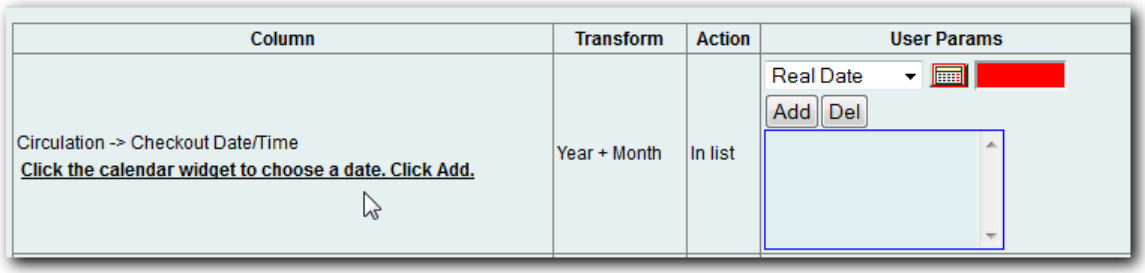
For multi-branch libraries, you would select *Circulating Library* with *In list* as the operator, so you could specify multiple branch(es) when you run the report.

Refer to Template Terminology for details of Transforms and Operators, and Aggregate and Non-aggregate filters.

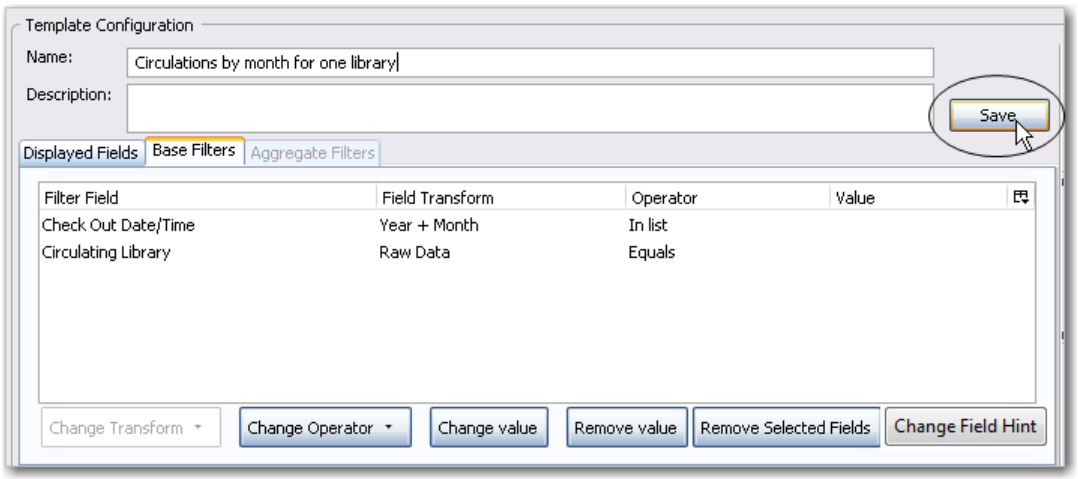
6. You may add a hint to the filter, e.g. explaining the function of the filter, what value is expected when setting up the report, etc. Select the filter and click *Change Field Hint*.



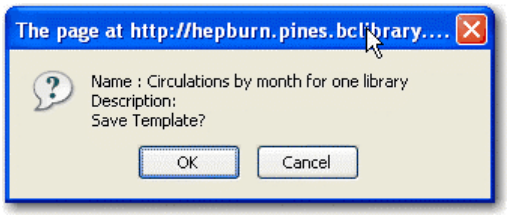
In the above example, we added some instruction on how to fill up the filter when setting up the report. The hint will show up on the report creation screen. Below is how it looks like on the report creation screen.



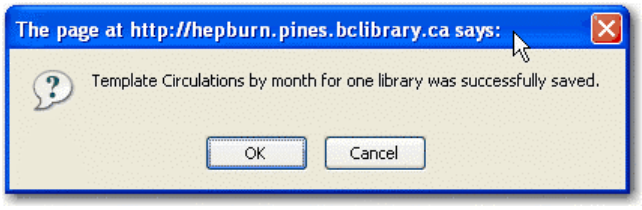
7. Once you have configured your template, you must name and save it. Name this template *Circulations by month for one library*. You can also add a description. In this example, the title is descriptive enough, so a description is not necessary. Click *Save*.



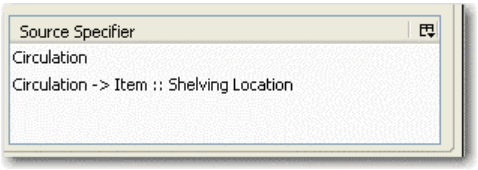
8. Click *OK*.



9. You will get a confirmation dialogue box that the template was successfully saved. Click *OK*.


The page at http://hepburn.pines.bclibrary.ca says:
Template Circulations by month for one library was successfully saved.
OK
Cancel

The bottom right hand pane is also a source specifier. By selecting one of these rows you will limit the fields that are visible to the sources you have specified. This may help to find out the source of the fields, e.g. a circulating library is from the circulation table or item table. Use **Ctrl**+Click to select or deselect items.



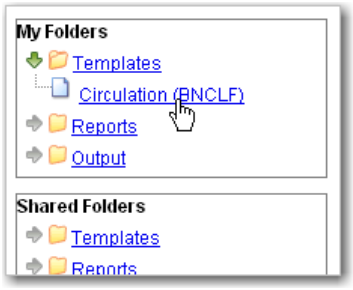
Once a template is saved, it can not be edited anymore. To make changes you will need to clone it and edit the clone. This will ensure that the work you have done will not be lost. As mentioned before, creating a template is complex. The first try seldom gets the perfect result. Your subsequent changes may not always improve the result. You may need to refer back to your old version. Make changes step-by-step. Check the correctness of the result on each step. This may help you to find out the exact cause of the issue. After you have the desired template, you may delete all the interim ones.

The above paragaphs described how to create a template from scratch with a very simple example. You may choose instead to use one of the generic templates created by the Sitka team to meet common reporting needs (see Chapter 32, *Shared Templates in SITKA_templates*). However, knowing how a template is created will help you understand the report structure and is recommended as an introduction to editing template fields and filters.

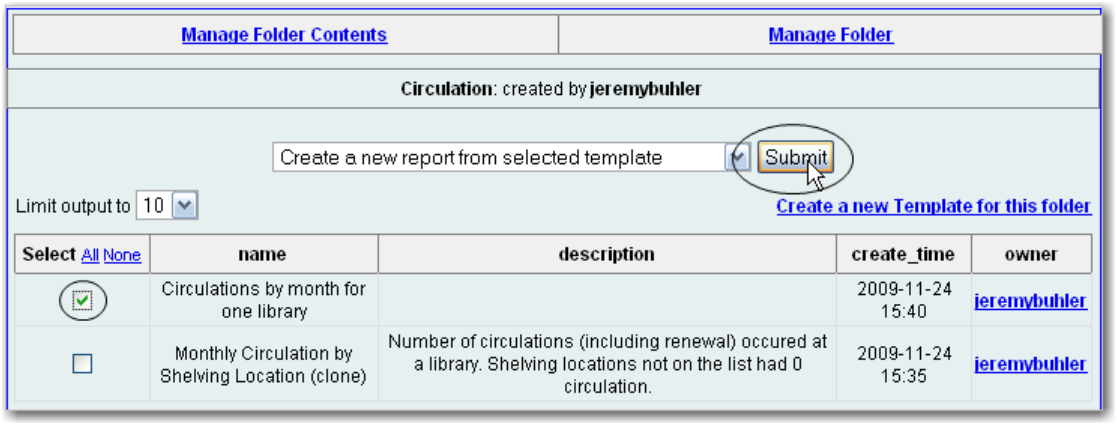
Chapter 28. Generating Reports from Templates

Now you are ready to run a report from the template you have created.

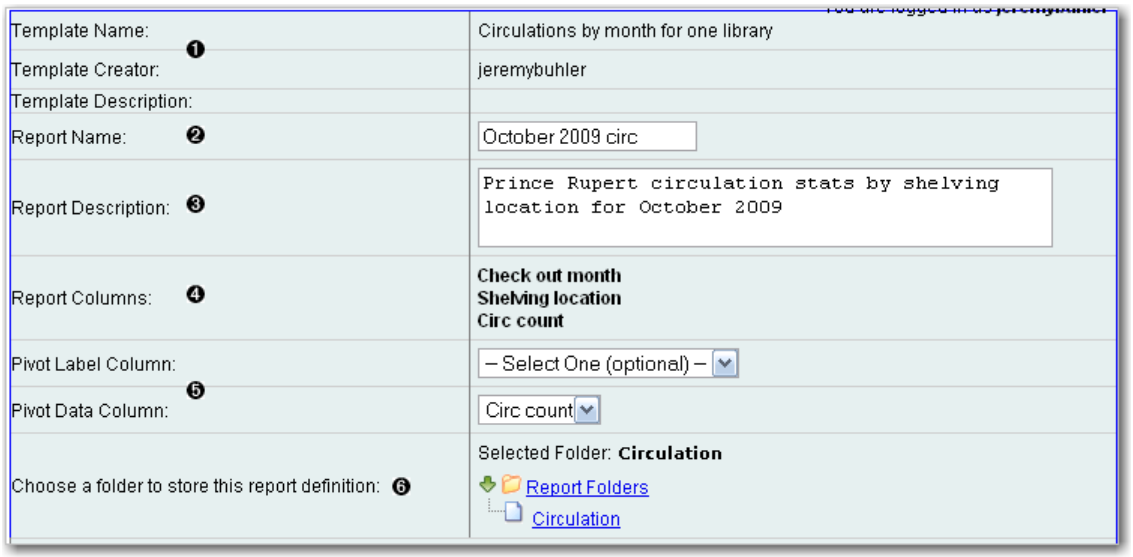
1. Find the template you just created in the Template folder. In the *My Folders* section, click the arrow next to *Templates* to expand this folder and select *circulation*.



2. Select the box beside *Circulations by month for one library*. Select *Create a new report from selected template* from the dropdown menu. Click *Submit*.



3. Complete the first part of report settings. Only *Report Name* ❷ and *Choose a folder...* ❻ are required fields.



❶ *Template Name*, *Template Creator*, and *Template Description* are for informational purposes only. They are hard coded when the template is created. At the report definition stage it is not possible to change them.

❷ *Report Name* is required. Reports stored in the same folder must have unique names.

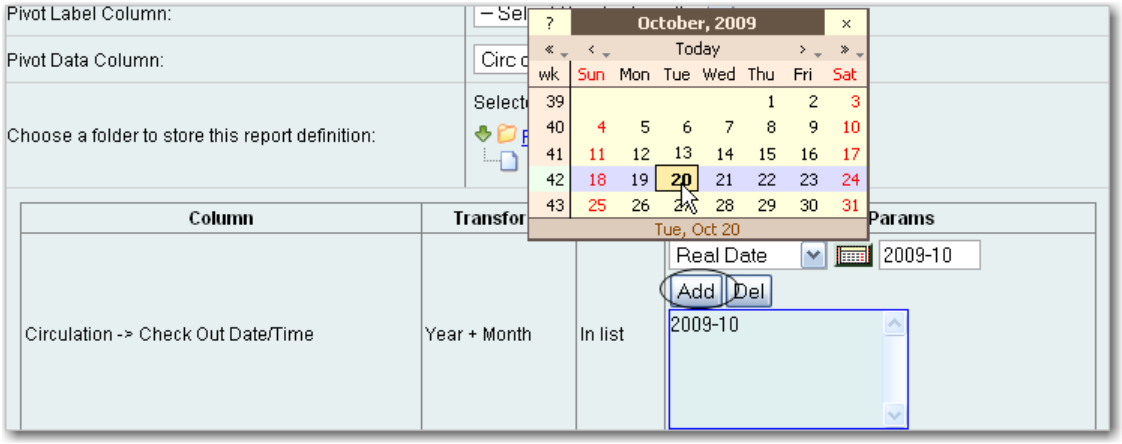
❸ *Report Description* is optional but may help distinguish among similar reports.

❹ *Report Columns* lists the columns that will appear in the output. This is derived from the template and cannot be changed during the report definition.

❺ *Pivot Label Column* and *Pivot Data Column* are optional. Pivot tables are a different way to view data. If you currently use pivot tables in MS Excel it is better to select an Excel output and continue using pivot tables in Excel. Please note that Pivot tables are suitable to some result data only.

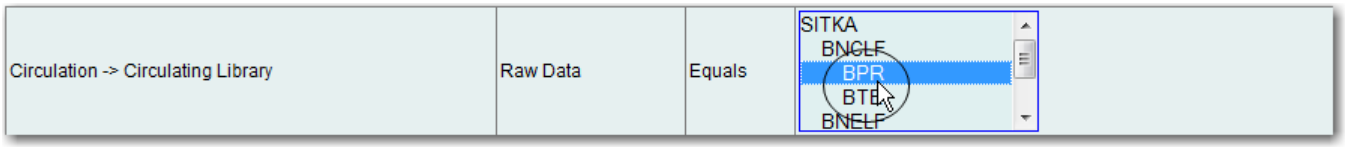
❻ You must choose a report folder to store this report definition. Only report folders under *My Folders* are available. Click on the desired folder to select it.

4. Select values for the *Circulation* > *Check Out Date/Time*. Use the calendar widget or manually enter the desired dates (always in YYYY-MM or YYYY-MM-DD format), then click *Add* to include the date on the list. You may add multiple dates with an InList operator by repeating the above step.

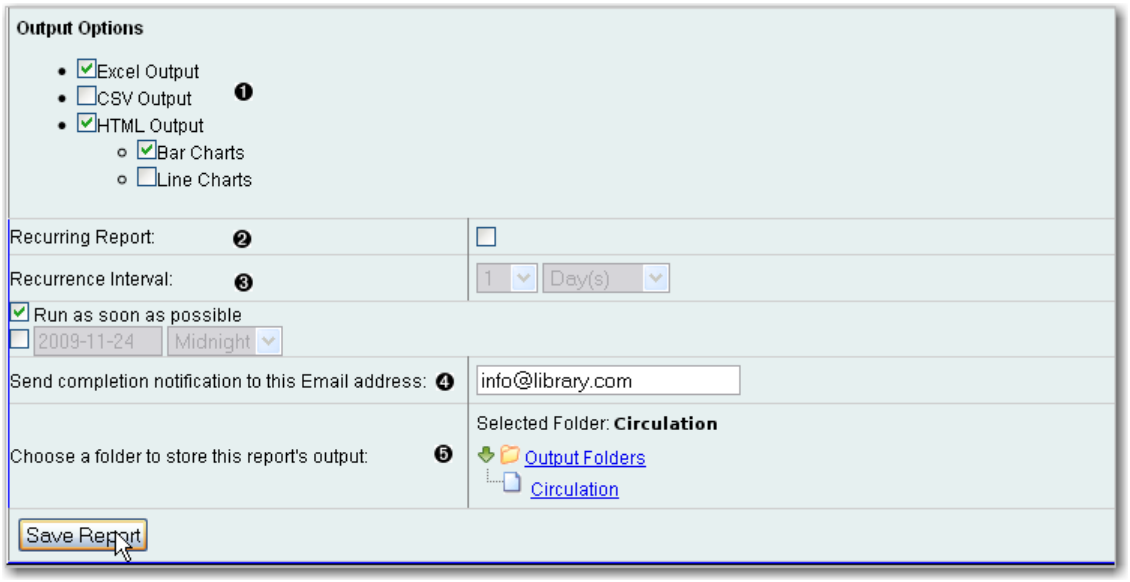


The *Transform* for this field is *Year + Month*, so even if you choose a specific date (2009-10-20) it will appear as the corresponding month only (2009-10).

5. Select a value for the *Circulating Library*.



6. Complete the bottom portion of the report definition interface, then click *Save*.



❶ Select one or more output formats. In this example the report output will be available as an Excel spreadsheet, an HTML table (for display in the staff client or browser), and as a bar chart. Please note that charts are suitable to some result data only.

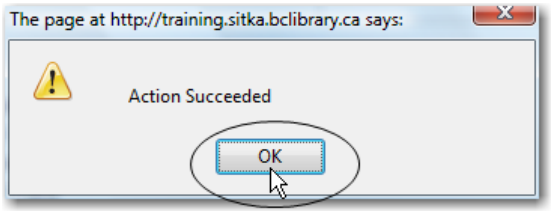
❷ If you want the report to be recurring, check the box and select the *Recurrence Interval* as described in Recurring Reports. In this example, as this is a report that will only be run once, the *Recurring Report* box is not checked.

❸ Select *Run as soon as possible* for immediate output. It is also possible to set up reports that run automatically in the future.

❹ It is optional to fill out an email address where a completion notice can be sent. The email will contain a link to a password-protected report output (staff login required). If you have an email address in your Local System Administrator account, it will automatically appear in the email notification box. However, you can enter a different email address or multiple addresses separated by commas.

❺ Select a folder for the report's output.

7. You will get a confirmation dialogue box that the *Action Succeeded*. Click *OK*.



Once saved, reports stay there forever unless you delete them. When a report is deleted all the linked output files will be deleted, too.

With version 2.8, report files are viewable and editable. You may view the contents of a report. You can generate a new report based on the past report file or re-schedule a recurring report. See Viewing/Editing/Rescheduling Reports for details.

The required value for filters should be in a format corresponding to the data transform. For example, for a call number field transformed to *First Continuous Non-space string*, you need to put in the call number prefix; for a field transformed to *Count* you need to give an integer. See Template Terminolgoy section for more on *Data Transforms*.

Action corresponds to *Operator* used for filter fields. It specifies how the given value will be compared with the field value. See Template Terminolgoy section for more on *Operators*.

When creating a report, you may disable an unwanted filter in the template by choosing an appropriate value for it. For example, if a template lists items created within a time frame, specify a time frame between "1900-01-01" and "today" to cover the whole collection; select all copy statuses on the list to bypass the filter on item status.

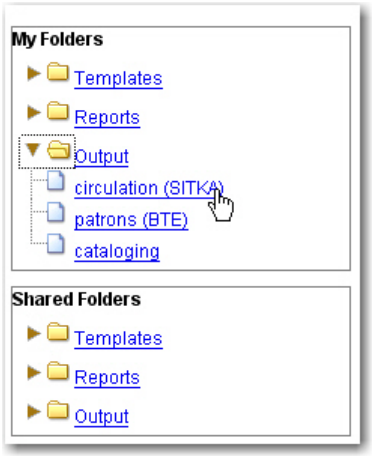
If the calendar widget is not provided for a date filter, key in the date in format yyyy-mm-dd.

Chapter 29. Viewing Report Output

Once a report is finished, the output is stored in the specified *Output* folder and will remain there until manually deleted. Evergreen sends an email with a link to the output if an email address(s) is supplied when the report was set up.

1. To view the report output in the staff client, open the reports interface from *Admin (-)* → *Local Administration* → *Reports*

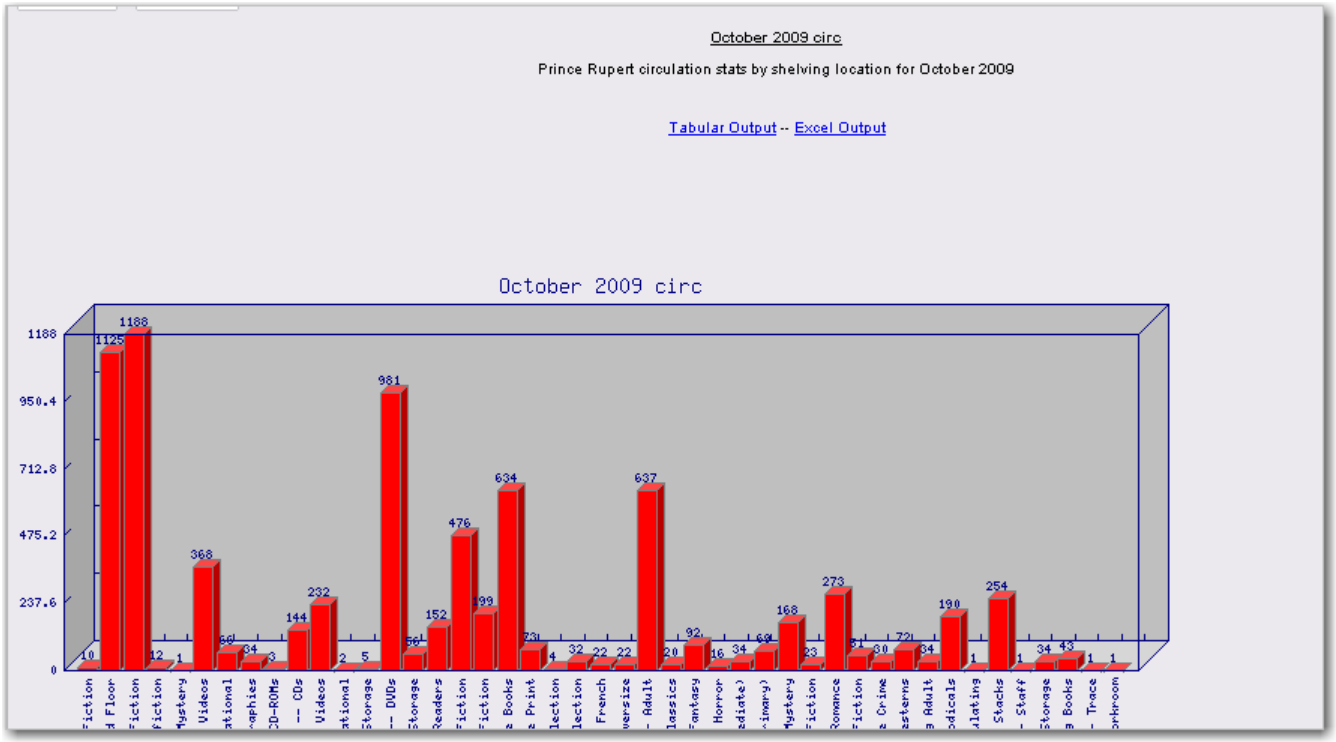
2. Click on *Output* to expand the folder. Select *Circulation* (where you just saved the *circulation report output*).



3. *View report output* is the default selection in the dropdown menu. Select *Recurring Monthly Circ by Location* by clicking the checkbox and click *Submit*.

Click on the report name in blue colour, you will see the template name and report description field.

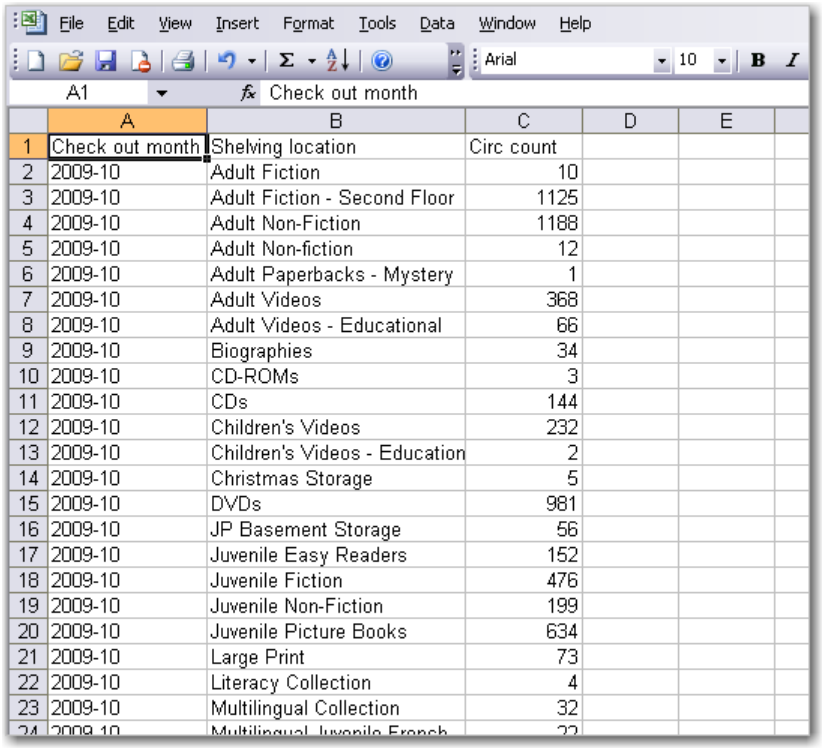
4. A new tab will open for the report output. Select either *Tabular Output* or *Excel Output*. If *Bar Charts* was selected during report definition the chart will also appear.



5. Tabular output looks like this:

Check out month	Shelving location	Circ count
2009-10	Adult Fiction	10
2009-10	Adult Fiction - Second Floor	1125
2009-10	Adult Non-Fiction	1188
2009-10	Adult Non-fiction	12
2009-10	Adult Paperbacks - Mystery	1
2009-10	Adult Videos	368
2009-10	Adult Videos - Educational	66
2009-10	Biographies	34
2009-10	CD-ROMs	3
2009-10	CDs	144
2009-10	Children's Videos	232
2009-10	Children's Videos - Educational	2
2009-10	Christmas Storage	5
2009-10	DVDs	981
2009-10	JP Basement Storage	56
2009-10	Juvenile Easy Readers	152
2009-10	Juvenile Fiction	476
2009-10	Juvenile Non-Fiction	199
2009-10	Juvenile Picture Books	634
2009-10	Large Print	73

6. If you want to manipulate, filter or graph this data, Excel output would be more useful. Excel output looks like this in Excel:



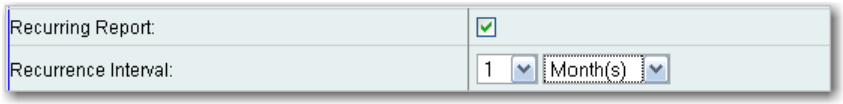
	A	B	C	D	E
1	Check out month	Shelving location	Circ count		
2	2009-10	Adult Fiction	10		
3	2009-10	Adult Fiction - Second Floor	1125		
4	2009-10	Adult Non-Fiction	1188		
5	2009-10	Adult Non-fiction	12		
6	2009-10	Adult Paperbacks - Mystery	1		
7	2009-10	Adult Videos	368		
8	2009-10	Adult Videos - Educational	66		
9	2009-10	Biographies	34		
10	2009-10	CD-ROMs	3		
11	2009-10	CDs	144		
12	2009-10	Children's Videos	232		
13	2009-10	Children's Videos - Education	2		
14	2009-10	Christmas Storage	5		
15	2009-10	DVDs	981		
16	2009-10	JP Basement Storage	56		
17	2009-10	Juvenile Easy Readers	152		
18	2009-10	Juvenile Fiction	476		
19	2009-10	Juvenile Non-Fiction	199		
20	2009-10	Juvenile Picture Books	634		
21	2009-10	Large Print	73		
22	2009-10	Literacy Collection	4		
23	2009-10	Multilingual Collection	32		
24	2009-10	Multilingual Juvenile French	22		

Chapter 30. Running Recurring Reports

Recurring reports are a useful way to save time by scheduling reports that you run on a regular basis, such as monthly circulation and monthly patron registration statistics. When you have set up a report to run on a monthly basis, you may request an email informing you that the report has successfully run. You can click on the link in the email that will take you directly to the report output. You can also access the output through the Reports interface as described in Chapter 29, *Viewing Report Output*.

To set up a monthly recurring report, follow the procedure in Generating Reports from Templates but make the changes described below.

1. Select the *Recurring Report* check-box and set the recurrence interval to 1 month.



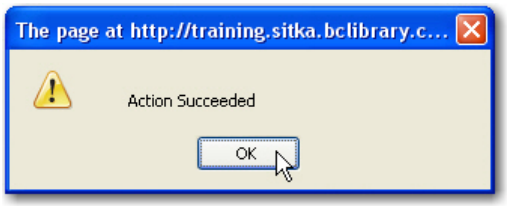
2. Do not select *Run ASAP*. Instead schedule the report to run early on the first day of the next month. Enter the date in YYYY-MM-DD format.

3. Ensure there is an email address to receive completion emails. You will receive an email completion notice each month when the output is ready.

4. Select a folder for the report's output.

5. Click *Save Report*. .

6. You will get a confirmation dialogue box that the *Action Succeeded*. Click *OK*.



With the above settings, you will get an email on the first day of each month with a link to the report output. By clicking this link it will open the output in a web browser. It is still possible to login to the staff client and access the output in *Output* folder.

Always use 'relative date' for recurring reports. Date is a filter on nearly every template. When setting up a recurring report, always choose *Relative Date*, instead of *Real Date* for any date filter on the report creating screen. When using relative date the actual date will be calculated when the report runs. Unlike a real date, the actual value of relative date is adjusted according to the run time. For example, if the report runs at 2012-10-10 23:00, a relative date transformed to YYYY-MM of "1 month ago" will be Sept, 2012; while a relative date transformed to YYYY-MM-DD of '1 day ago" will be 2012-10-09. When it runs at 2012-11-10 23:00 "1 month ago", it will be Oct, 2012, while "1 day ago" will be 2012-11-09. The date goes by calendar day or month.

How to stop an existing recurring report? To stop a recurring report, you may delete the pending output from Pending area in Output folder. You may also delete the report from Report folder. But deleting the report will delete all the output files generated by it, too.

How to make changes to an existing recurring report? Sometimes you may wish to make changes to a recurring report, e.g. the recurrence interval, generation date, email address to receive completion email, output format/folder or even filter values (such as the number of days overdue). You may do it by editing the report. See Viewing/Editing/Rescheduling Reports for details.

Report running interval should correspond to the date filter. For example, if the template filters on a date instead of month, a recurring report running with a monthly interval may miss a day or capture an extra day's data. So it works better if the filter can be transformed to month.

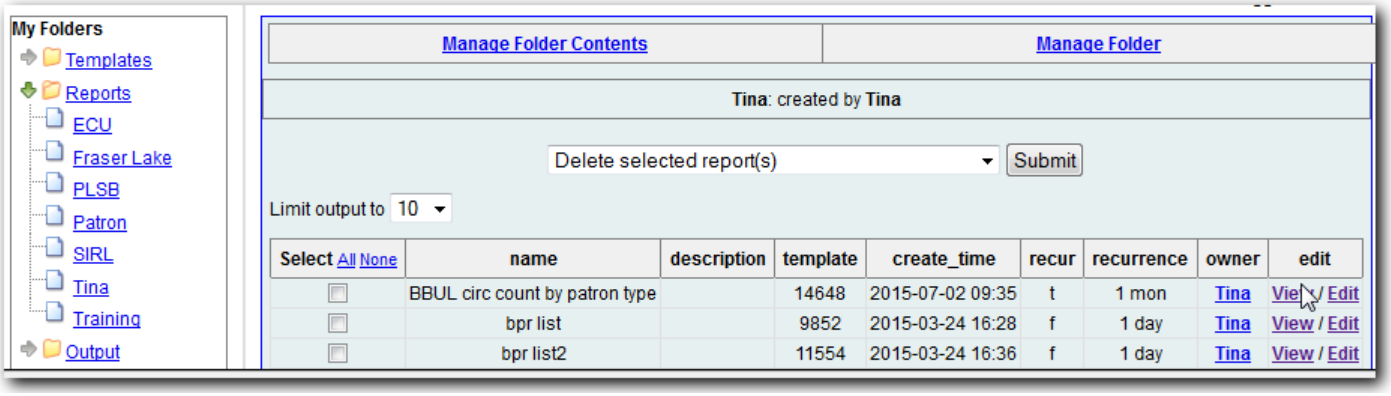
Schedule your monthly report to run early next month, but not at the end of the current month.

Once you have been on Evergreen for a year, you can set up your recurring monthly reports to show comparative data from one year ago. To do this select relative dates of 1 month ago and 13 months ago.

Chapter 31. Viewing/Editing/Rescheduling Reports

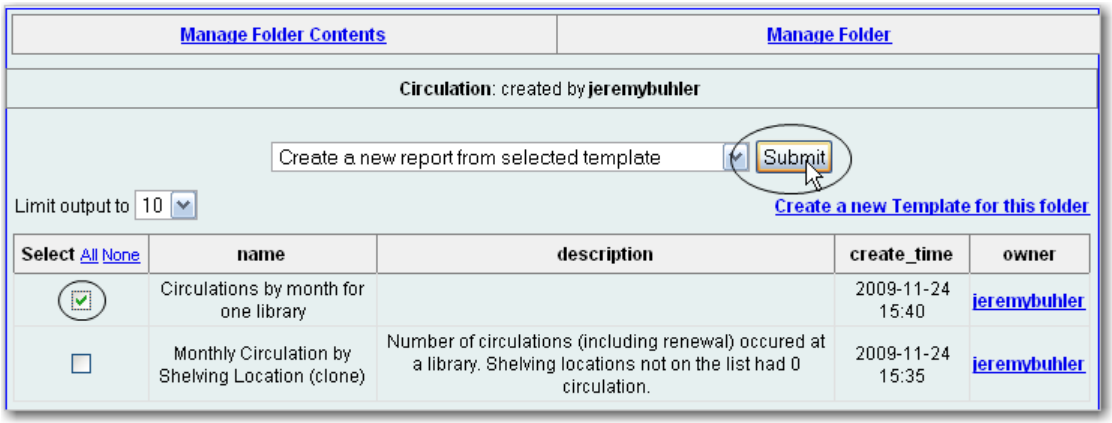
With Evergreen version 2.8, you may view or edit an existing report to change the values for filters, run-time, email reminder recipient, recurring interval, etc. You may generate a new report by editing an existing non-recurring report, or keep the recurring report but update the values for filters or use a new schedule. For example, you may reschedule a recurring report to run at 2am, instead of 10am or change the email reminder recipient. Or you may update the date fields in last month's report to generate new reports for this month.

To view or edit a report, find the report you wish to view/edit in the Reports folder. Click *View* or *Edit* in the *Edit* Column. We choose *Edit* in the below example.



The report is loaded on report creation screen. You may make the changes as when you create a new report. Once all the necessary changes have been made, click *Save Report* to update the existing report or *Save as New* to create a new report. Note that if using *Save as New*, you may need to update the report name or choose a different report folder. Evergreen does not allow two reports in one folder to share the same name.

When choosing *Save as New* to create a new report, the old report will be kept. If it is a recurring report, you will continue receiving the outputs from it.



When choosing *View* a report, the above screen will be displayed in non-editable mode.

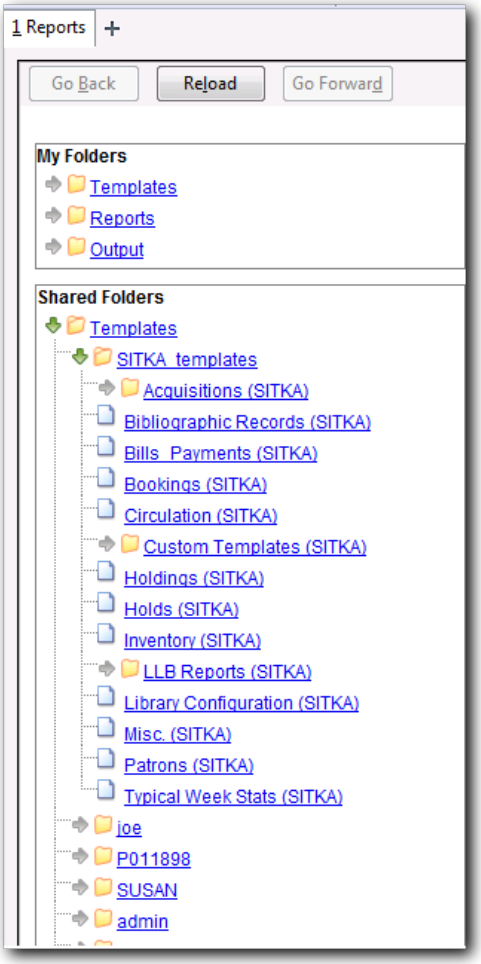
In order to get a new report by editing a non-recurring report, you have to give the report a new name or save it in another folder. Evergreen does not stop you editing a non-recurring report. But without using *Save as New*, the new report will not be generated.

Chapter 32. Shared Templates in SITKA_templates

The Sitka support team has created generic templates for commonly requested reports and shared them under the *SITKA_templates* folder. This chapter describes how to make local copies of these templates for routine reports or as a starting point for customization. When creating a new template it is a good idea to review the shared templates first: even if the exact template you need does not exist, it is often faster to modify an existing template than to build a brand new one. A Local System Administrator account is required to clone templates from the *Shared Folders* section and save them to *My Folders*.

32.1. What's in SITKA_templates

The Sitka support team uses a dedicated staff account, SITKA_templates, to share ready-to-use templates. Below is what a Local System Administrator can see after going to the Reports interface, then follow the path to *Shared Folders*, click the arrow (or + sign) in front of *Templates*, and then *SITKA_templates*.



From *Acquisitions* to *Typical Week Stats* are the subfolders containing various templates. Templates using the same source table are usually grouped together under one subfolder. These templates are created based on the anticipation that most libraries may need such reports. The Support Team tends to make these templates generic, which means they contain more information. Individual libraries may have slightly different requirements. You can remove the

unwanted information when cloning the templates or choose appropriate values for some filters to disable them. These templates are usually referred to as Sitka standard templates.

The following is a guideline of the templates for various kinds of reports. Please note that the Support Team regularly maintains the templates. The list below may not be the latest.

Overdue reports. Find overdue reports in *Circulation* folder. There are templates capturing checkouts with due date within a selected time frame for all patrons or those without email address (phone list) or the due date is before a selected date. You may use these templates to set up your overdue reports capturing items which are at a certain number of days overdue.

Circulation statistics reports. These templates are in *Circulation* folder. The regular circulation statistics can be grouped by various criteria: patron's home library, profile and/or stat cat; items' owning library and/or shelving location. There are two sets of templates: one set limit the circulation period by selected dates; the other selected month(s). The latter are for monthly recurring reports.

Other circulation statistics related templates are:

- non-catalogued circulation count
- pre-catalogued circulation count
- pre-catalogued circulation count for items with dummy title prefix of "ILL:" (ILL statistics via pre-catalogued circulation)
- checkin count
- in-house use count for non-catalouged items
- in-house use count for catalogued items
- in-house use count per title

Other circulation related templates are:

- lost and paid item list
- lost with outstanding bills item list
- claimed returned item list

Reports on collection. These templates are in *Holdings* folder. You will find templates counting items or titles of your whole collection or catalogued within the selected time period (new title/items statistics). The numbers are grouped by shelving location and/or circulation modidfier.

Another group of templates in *Holdings* folder are item/title lists for items meeting various criteria: having selected shelving location(s) and/or circulation modifier(s), copy stat cat, barcode prefix, call number prefix or within a call number range; or being catalogued (new title/item list), marked missing, lost or deleted within selected time period.

In this folder, you will also find templates listing pre-catalogued items and items with certain circulation history (items with fewer circulation count for weeding report or more circulation count for popular title/item report).

Patron reports. All patron reports are in *Patrons* folder. You may find templates counting patrons by profile group and/or patron stat cat, registered or expired/expring within a selected time period, or with circulation history within a selected time period.

Another group of templates list selected information for patrons meeting some conditions such as: email list for all or those patrons having certain stat cat; names and barcode for patrons without circulation history within selected time frame; patrons born before a selected date (seniors list); patrons exceeding maximum fine limit.

Besides, there is a template that counts patron's OPAC logins and another that summarizes the answers to patron survey question(s).

Reports on bibliographic information . It is not easy to generate reports based on bibliographic information due to the bibliographic record structure. But a simple report that lists the values in a selected MARC tag and subfield for the whole collection is possible. And the bibliographic records can be limited by a selected value of a MARC tag and subfield. These templates are in *Bibliographic Records* folder.

Bills and payments. You can find the templates listing the details of various kinds of payments made in a selected time period, and a template listing bills with negative balance.

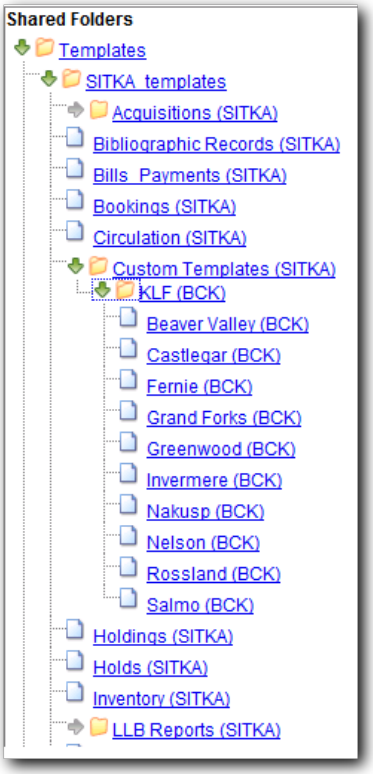
Hold reports. Holds related reports are in this folder, including reports for holds that have been long time outstanding (requested some time ago but not filled yet), cancelled, or have no eligible copies to be filled. There are other templates that count the total number of holds placed or fulfilled within a time span, and the hold count per title for popular titles.

Inventory. The two templates in *Inventory* folder list items based on whether the item showed up (being scanned on shelves or returned) in the library while the inventory was taken. The result of the *Inventory - un-scanned items* are the potential missing items.

Library setting and policy related reports. Find them in *Library Configuration* folder.

Other folders. If your library uses the Acquisitions Module or the Booking Module, you may find related templates in the relevant folders.

***Custom Templates* folder.** If you open this folder, you will see a subfolder for your library federation with sub-subfolders for your library and other libraries within your library federation.



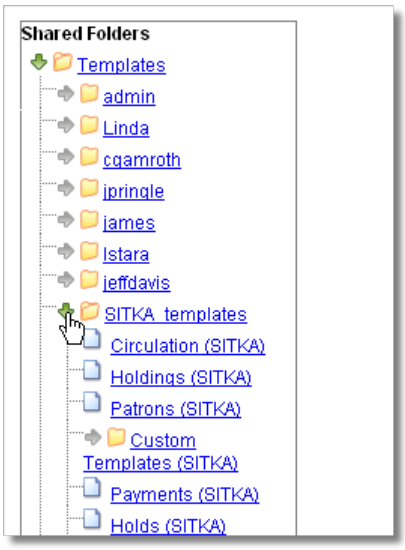
These folders are created when the Support Team creates or customizes templates for individual libraries. The templates go to these folders when there are similar templates in the standard folders already, or the Support Team does not anticipate wide use of the templates. The Support Team tries to limit the number of templates in each standard folder so that staff may find the target template easily.

32.2. Clone a template from *SITKA_templates*

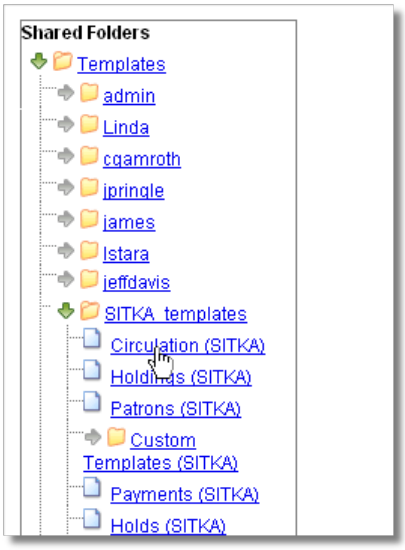
The steps below assume you have already created at least one *Templates* folder. If you have not done so, please see Chapter 26, *Folders*.

1. Access the Reports interface from the *Admin* menu under *Local Administration* → *Reports*

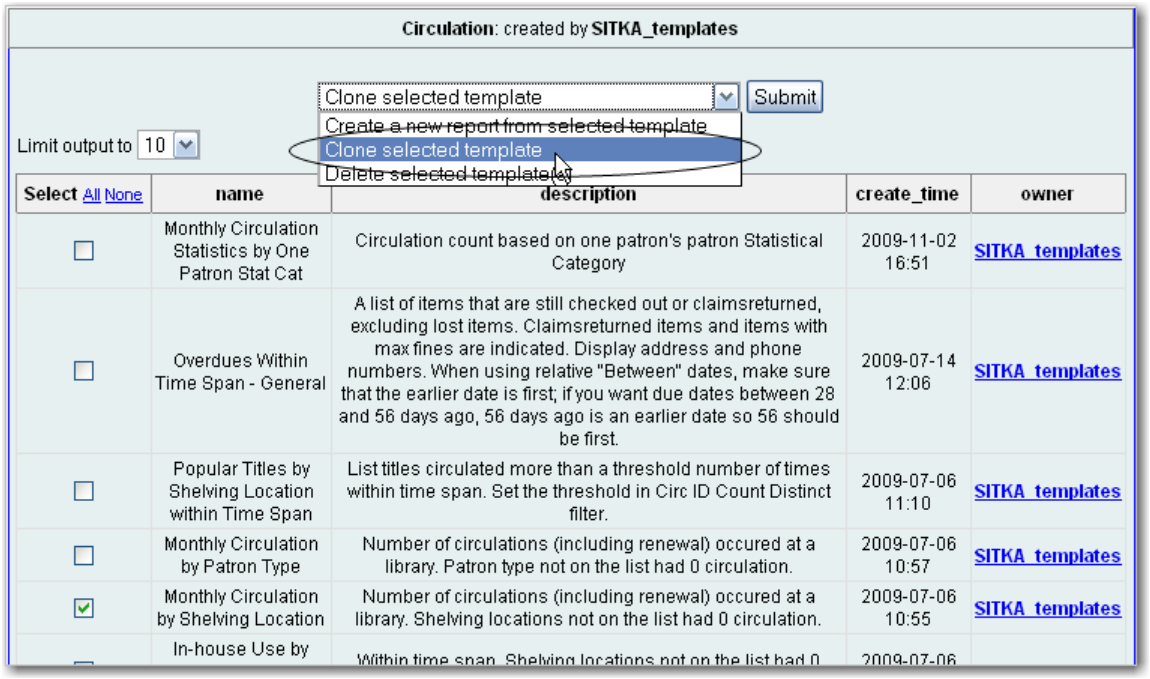
2. Under *Shared Folders* expand the *Templates* folder and the *SITKA_templates* subfolder. To expand the folders click on the grey arrow or folder icon. Do not click on the blue underlined hyperlink.



3. Click on the *Circulation (SITKA)* subfolder.

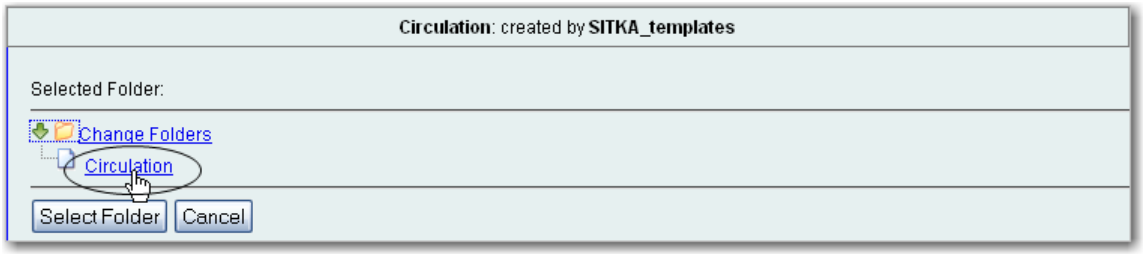


4. Select the template you wish to clone. In this example, we are cloning the *Monthly Circulation by Shelving Location* template. From the dropdown menu choose *Clone selected templates*, then click *Submit*.

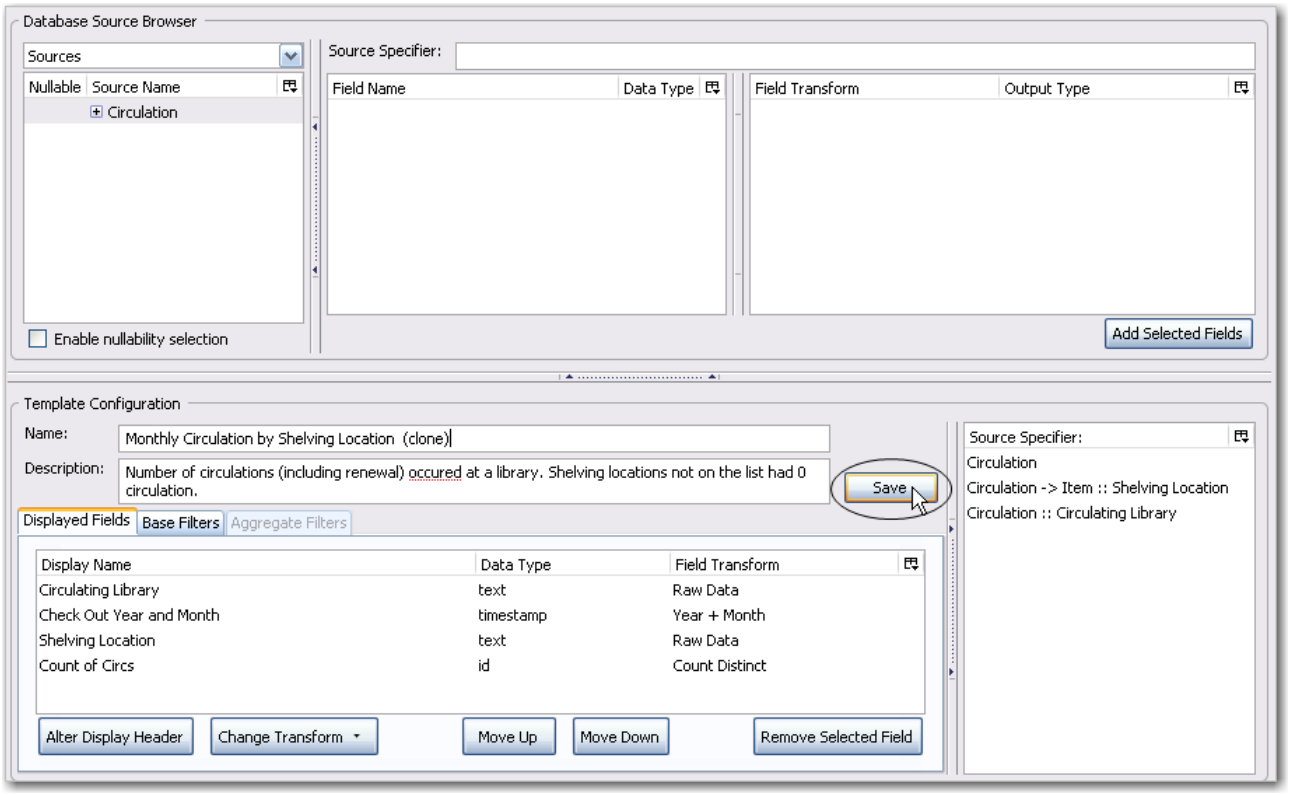

Circulation: created by SITKA_templates
Clone selected template
Submit
Create a new report from selected template
Clone selected template
Delete selected template(s)
Limit output to 10
Select All None
name
description
create_time
owner
Monthly Circulation Statistics by One Patron Stat Cat
Circulation count based on one patron's patron Statistical Category
2009-11-02 16:51
SITKA_templates
Overdues Within Time Span - General
A list of items that are still checked out or claimsreturned, excluding lost items. Claimsreturned items and items with max fines are indicated. Display address and phone numbers. When using relative "Between" dates, make sure that the earlier date is first; if you want due dates between 28 and 56 days ago, 56 days ago is an earlier date so 56 should be first.
2009-07-14 12:06
SITKA_templates
Popular Titles by Shelving Location within Time Span
List titles circulated more than a threshold number of times within time span. Set the threshold in Circ ID Count Distinct filter.
2009-07-06 11:10
SITKA_templates
Monthly Circulation by Patron Type
Number of circulations (including renewal) occured at a library. Patron type not on the list had 0 circulation.
2009-07-06 10:57
SITKA_templates
Monthly Circulation by Shelving Location
Number of circulations (including renewal) occured at a library. Shelving locations not on the list had 0 circulation.
2009-07-06 10:55
SITKA_templates
In-house Use by
Within time span. Shelving locations not on the list had 0
2009-07-06

By default Evergreen only displays the first 10 items in any folder. To view all content, change the *Limit output* setting from *10* to *All*.

5. Choose the folder where you want to save the cloned template, then click *Select Folder*. Only template folders created with your account will be visible. If there are no folders to choose from please see Chapter 26, *Folders*.



6. The cloned template opens in the template editor. From here you may modify the template by adding, removing, or editing fields and filters as described in Chapter 27, *Creating Templates*. Template *Name* and *Description* can also be edited. When satisfied with your changes, click *Save*.

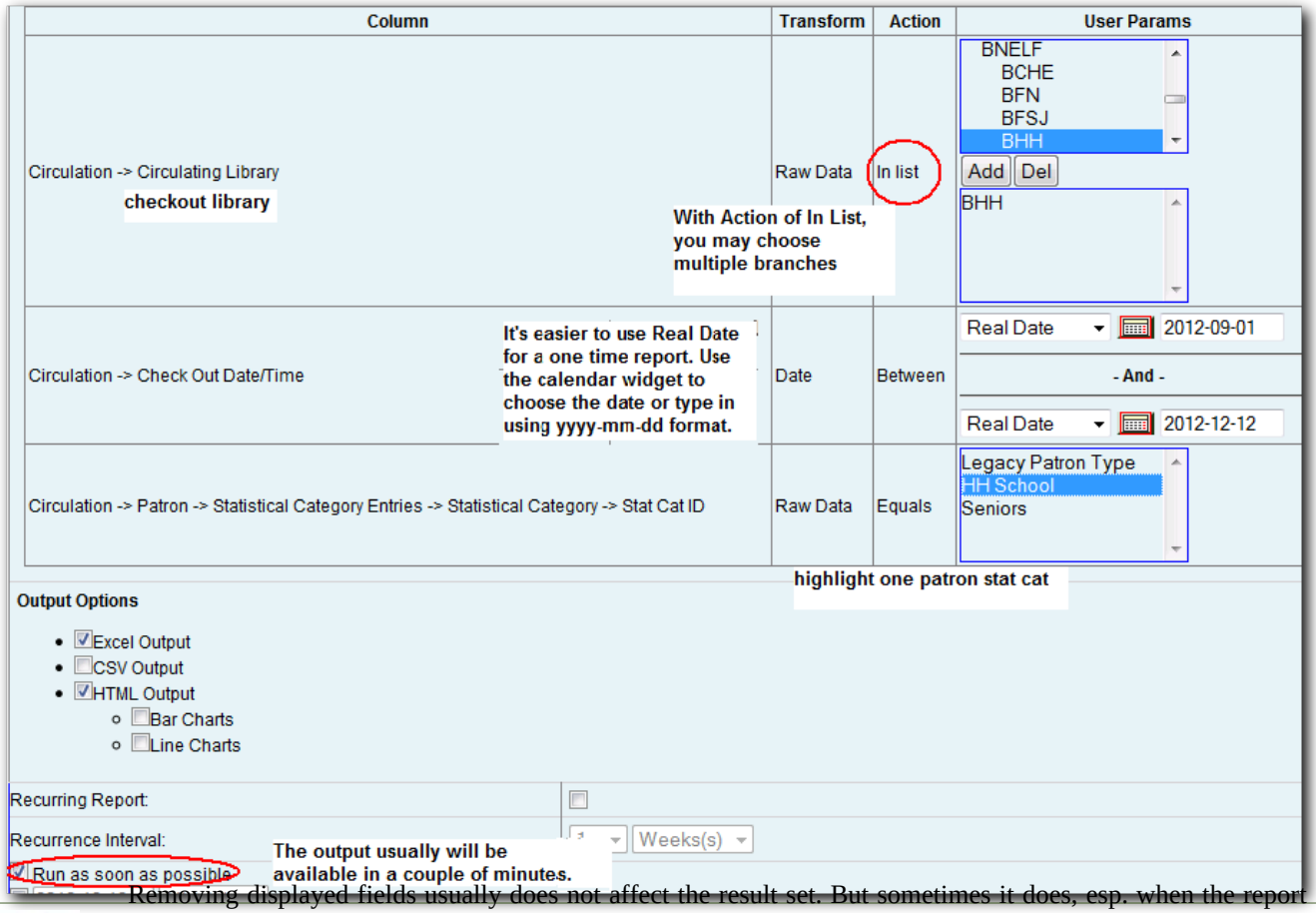


7. Click OK in the resulting confirmation window.

32.3. Modify a template

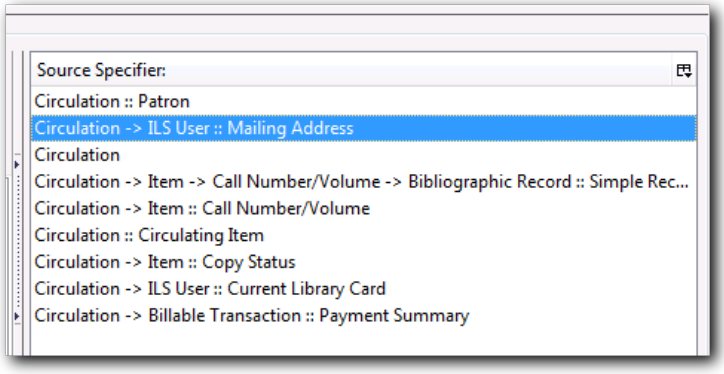
Once saved it is not possible to edit a template. To make changes, clone the template and change the clone.

To modify a template, repeat the above steps 1-6. You will see the template open on Template Creating screen. Click *Displayed Fields* you will see all the displayed fields. To remove one, highlight it and click *Remove Selected Field*. You may move a field up or down the list, which will affect the sorting of the result records. You may also change the column label or the transform of the field by using respective buttons. See Field Transforms section for more information.



Removing displayed fields usually does not affect the result set. But sometimes it does, esp. when the report displays the count of records by each group. Sometimes some fields may contain important information. Removing them may cause misunderstanding the results. Usually such fields are explained in the template *Description*. Be cautious when you delete such fields.

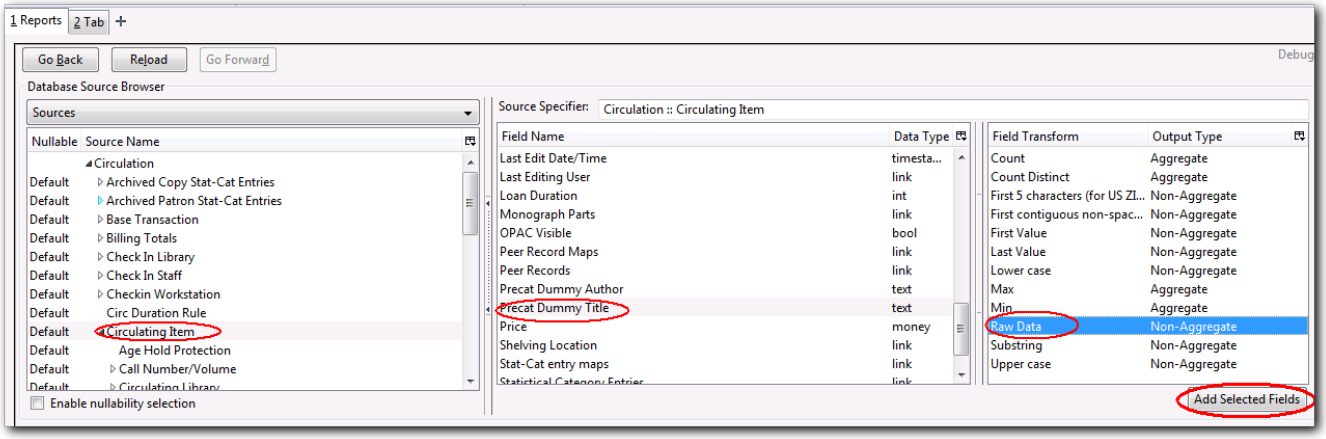
If you are not clear where a displayed field is from, you may use the *Source Browser* to the right to display fields from the selected table only.


Source Specifier:
Circulation :: Patron
Circulation -> ILS User :: Mailing Address
Circulation
Circulation -> Item -> Call Number/Volume -> Bibliographic Record :: Simple Rec...
Circulation -> Item :: Call Number/Volume
Circulation :: Circulating Item
Circulation -> Item :: Copy Status
Circulation -> ILS User :: Current Library Card
Circulation -> Billable Transaction :: Payment Summary

To add a displayed field, go to the *Sources* to open the source table to find the field or follow the links to the appropriate table which contains the field you want to display. Click the text in the *Sources* to display fields in the table in *Field Name* pane. Click the arrow in front of the text to display the linked tables in the *Sources* pane.

Once find the field, select it in *Field Name* pane and the appropriate transform in *Field Transform* pane. Click *Add Selected Fields*.

The below screenshot shows how to add *Precat Dummy Title* field. Find *Circulating Item* table, which is linked from *Circulation*. Click it (text) to display its fields in *Field Name*. Select *Precat Dummy Title*, and then *Raw Data* in *Field Transform*.



You can not change the starting source table, but have to follow the links to tables in the *Sources* pane. Changing the starting table will remove all existing fields, meaning building a new template from scratch.

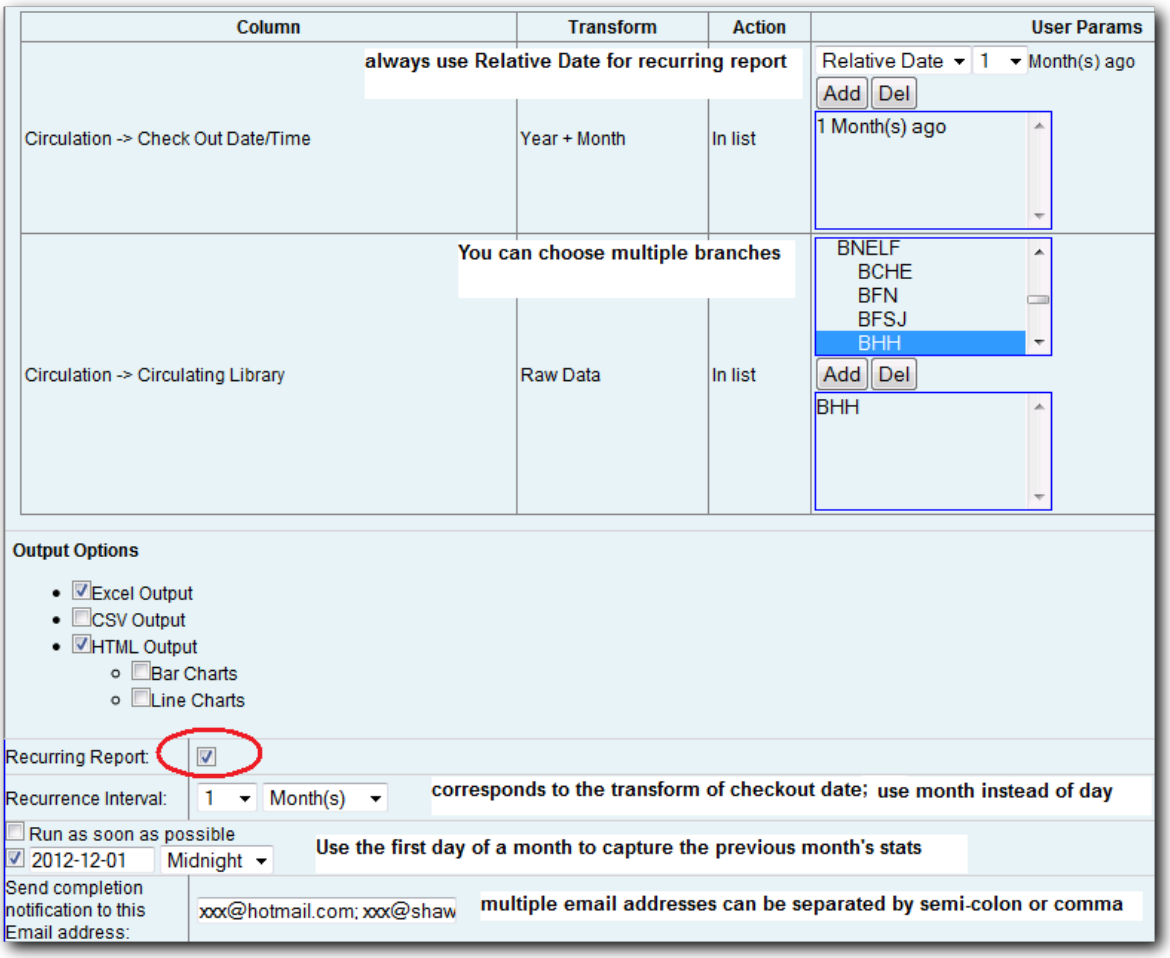
Select *Base Filters* or *Aggregate Filters* to add or remove filters. The steps are the same as adding or removing displayed fields. Be careful with filters as usually changing filter makes a difference in the result set.

32.4. Examples of using Sitka's templates

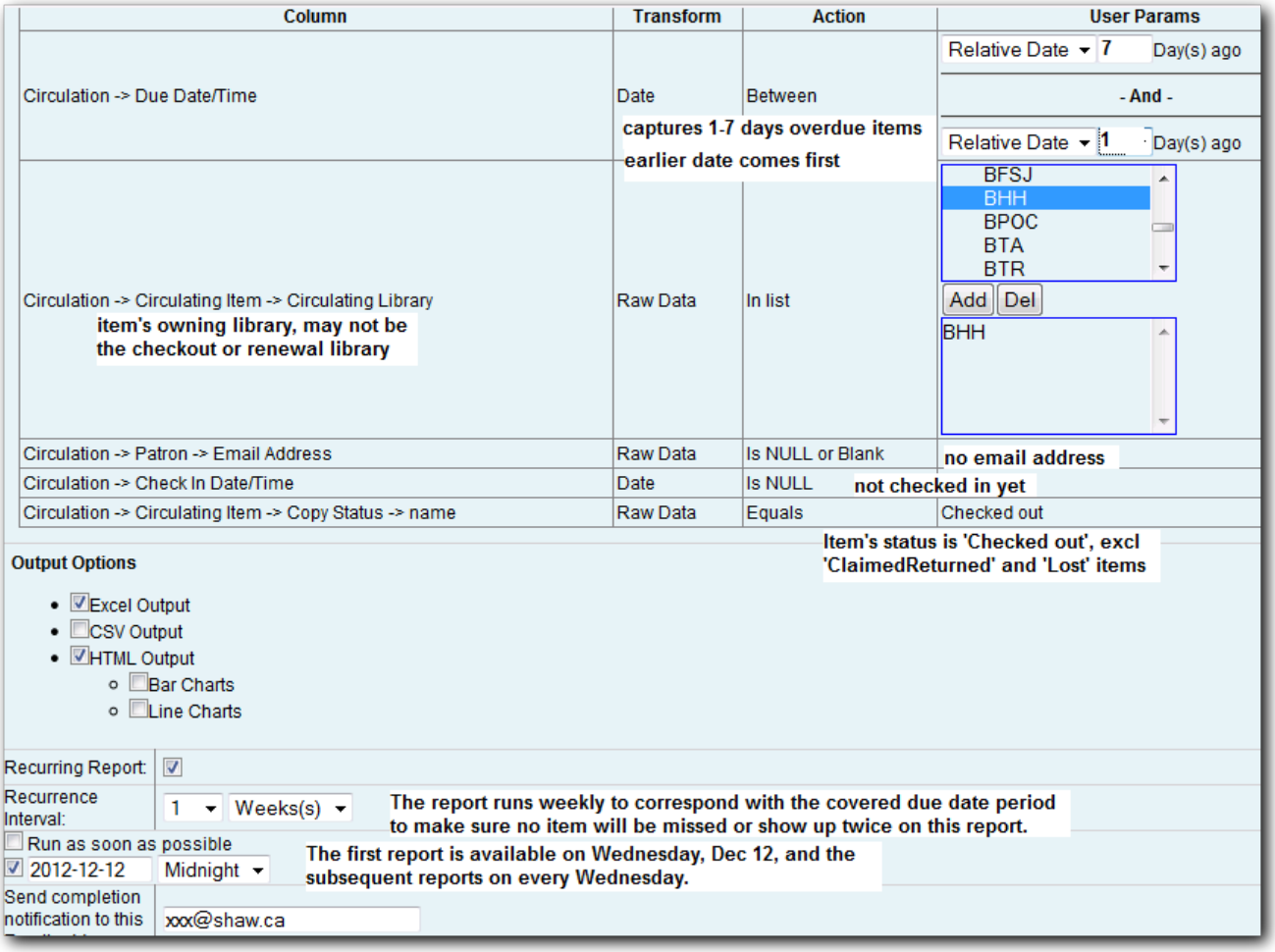
Please clone templates in *SITKA_templates.* and set up your reports from your own copy. This is to avoid any potential impact that may be resulted from changing the orignal templates. The Support Team regularly maintains these templates. Deletion may happen. Deleting a template will delete all linked reports and output files.

Below are a few screenshots showing you how to set up the reports based on some templates in *SITKA_templates.* Some explanation is added in the boxes with light coloured background.

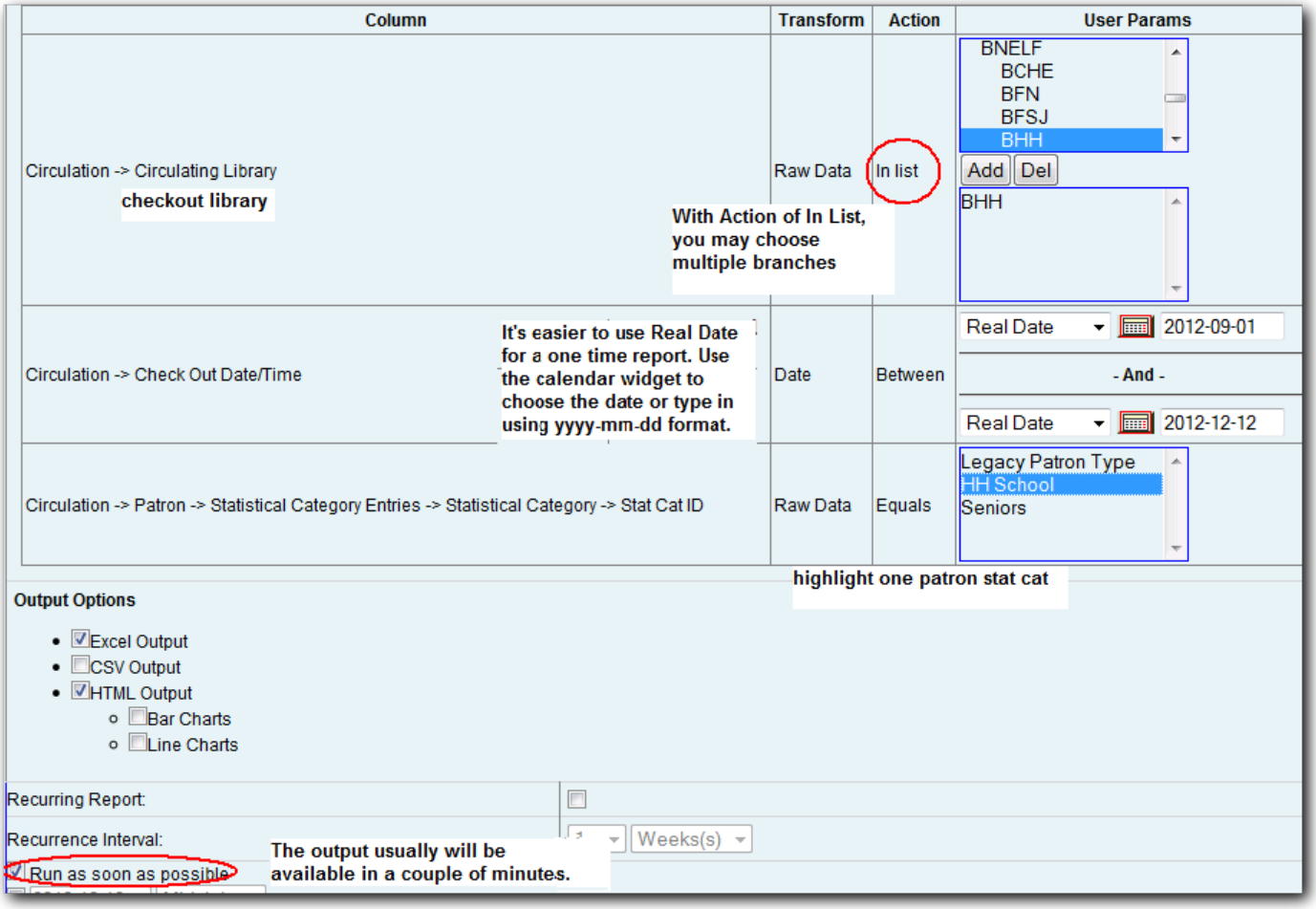
1. Setting up a monthly recurring report by using template: *Monthly Circulation by Shelving Location (updated to include item's owning library)* in *Circulation* folder:



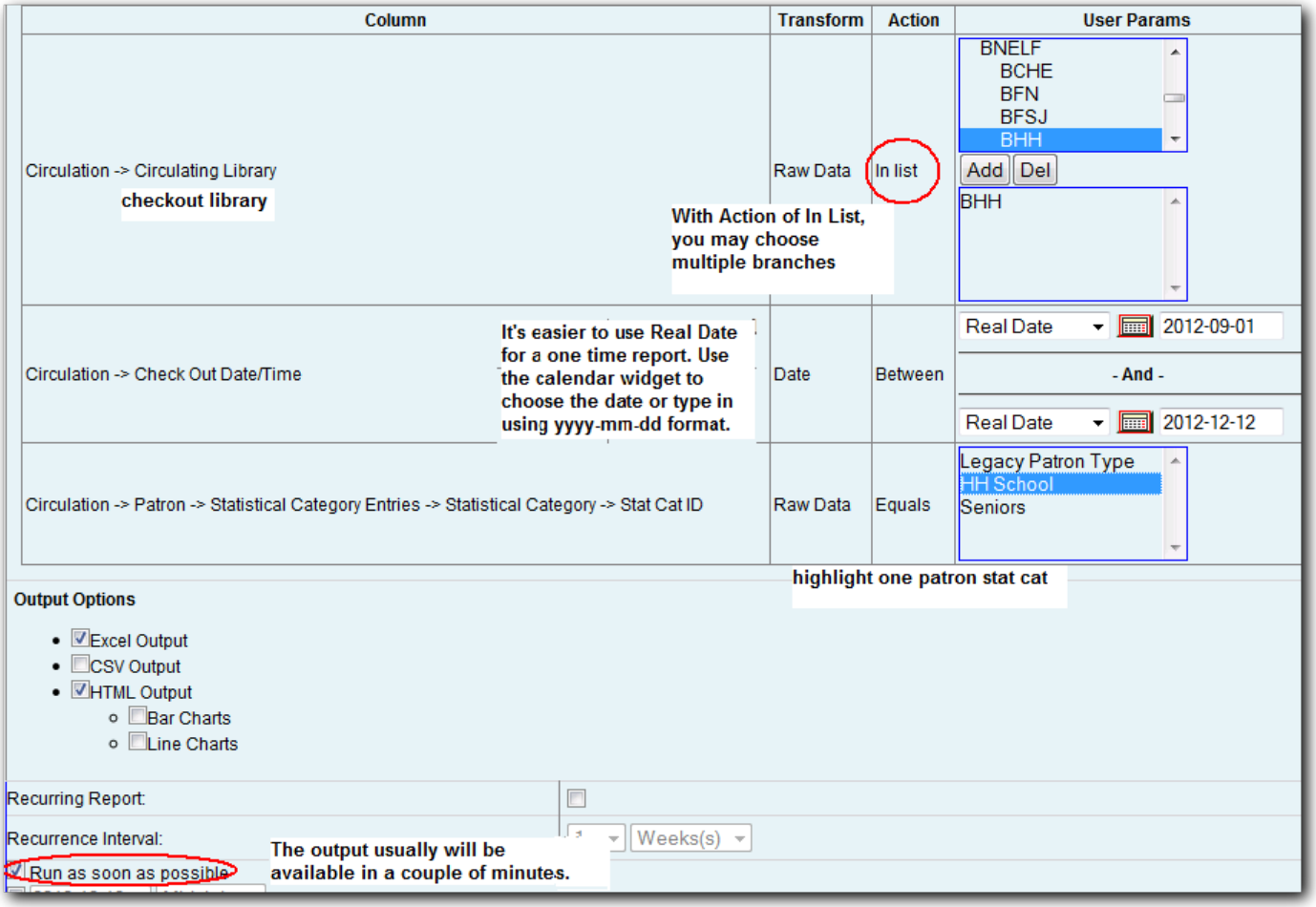
2. Setting up a weekly recurring report by using template: *Overdues Within Time Span - for Patrons without Email* in *Circulation* folder:



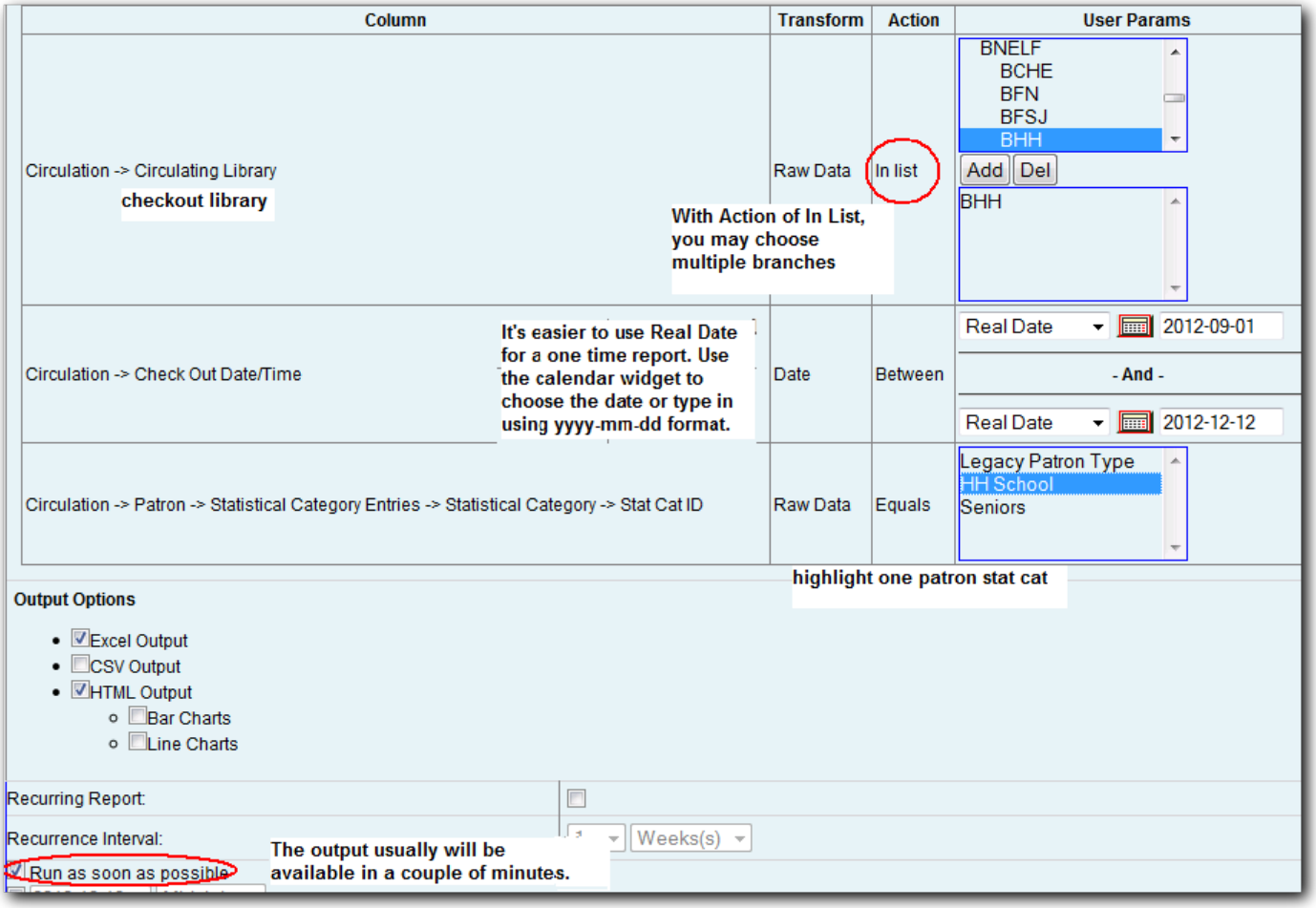
3. Setting up a one-time report by using template: *Circulation Statistics by One Patron Stat Cat within timespan* in *Circulation* folder:



4. Setting up a report by using template: *Items List by Shelving Location* in *Holdings* folder:



5. Setting up a report by using template: *Weeding - Items with few circulations since a selected month* in *Holdings* folder:



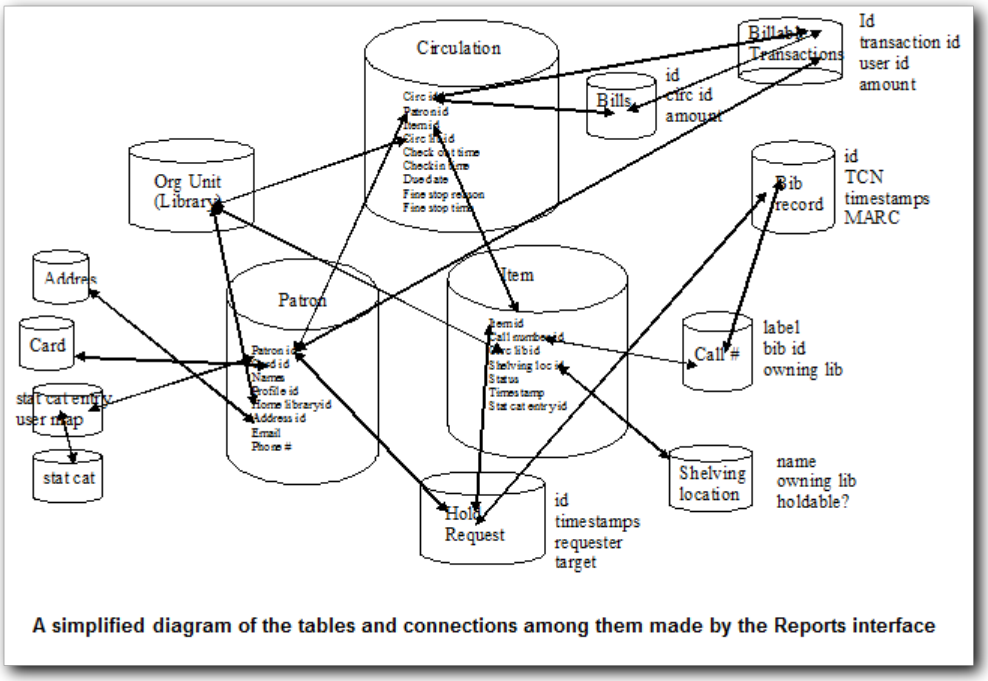
Chapter 33. Commonly used tables and views in Evergreen database

You are creating/updating records when you work on Evergreen. Reporting means you extract some of these records from the database that meet your requirements. Understanding the Evergreen database and how records are created/ updated when tasks are performed on the staff client, will help you when you create templates and set up reports on the Reports interface.

There are various kinds of data used by Evergreen, such as patron's names, address, barcode, item's barcode, shelving location, status, price; checkout date, returned date, fines and bills and so on. This data must be organized in an efficient and effective way to make sure they can be stored and retrieved easily.

Evergreen uses various tables to keep each type of records. You can visualize a table as an MS Excel Worksheet: a specified number of columns with unlimited number of rows. Each column is called a field in the database terminology and each row is a record. There are many tables in Evergreen database. Each contains a certain type of records. The fields in a record you see on the Staff Client may be from more than one tables. For example, in a patron record, you can find patron's names, address, phone number, barcode, profile, etc. all in one record. But in the database, patron's address, barcode, and profile are in separate tables. You do not need to know where these fields are from when editing a patron record on the Staff Client, but you have to know it when creating a template on the Reports interface.

Since various information about one patron is saved in separate tables, there must be a mechanism of matching the information about one patron correctly to make sure all information is about the same patron. This is done via recording the patron id (a unique number in the main patron record) in every related table. So via recording the id of a record in another table, two tables are connected. The connections among many tables are pre-made by the Reports interface. You just need to follow the link to find the data saved in the related table. Below is a simplified diagram showing the connections among some commonly used tables/views on the Reports interface, which can be a guide for you to find various fields in different tables. Some explanation of these tables is after the diagram.



A simplified diagram of the tables and connections among them made by the Reports interface

Commonly used tables and views

ILS User (aka Patron or User): contains patron records. A patron's name, phone number, email address, and registration date can all be found in this table. Follow the links to the table *Current Library Card* to find a patron's current barcode, *Circulation* to find the circulation history, *Home Library*, *Mailing Address*, *Physical Address*, and *Main Profile Group*, etc. to find more information about the patron.

Item (aka Circulating Item): contains copy records. Item's barcode, creation date, active date, last edited date, last copy status change date and price are in this table. For related information like call number, circulating library, circ modifier, status, shelving location, etc., you need to follow the links to the respective table to find them. For title information you need to follow the *Call Number* table to the *Bibliographic Record* table to find it. Follow the link to the *Circulation* table to find an item's circulation history.

Pre-catalogued item information such as dummy ISBN, title and author are also in this table. When a pre-catalogued item is checked out, an item record is created. If the barcode is already in the table and the item is not marked deleted, the item record will be updated with the new title, author, etc.

Bibliographic Record. Contains title information. To find the basic bibliographic information such as title, author, ISBN, etc., follow the link to *Simple Records Extract*.

Circulation. Contains circulation records, including pre-catalogued item circulations. When an item is checked out, a circulation record is created. When an item is renewed, the existing circulation record is closed and another record is created. Below are some important timestamps in this table.

Checkout Date/Time: the time when an item is checked out

CheckIn Date/Time: the effective date when the item is treated as checked-in

CheckIn Scan Date/Time: the time when the check in action is taken

Due Date/Time: For all daily loans the due time is 23:59:59 of the day in Pacific Time. Hourly loans have specific time with time zone information.

Fine Stops Date/Time: the date when the Maximum Fine limit has been reached, or the item is returned, marked lost or claimed returned. After this date, the fine generator will not create new overdue fines for this circulation.

Record Creation Date/Time: the date and time when the circulation record is created. For online checkout it is the same as Checkout Date/Time. For offline checkout, this date is the offline transaction processing date.

Transaction Finish Date/Time: the date when the bills linked to this checkout have been resolved. For a regular checkout without bills this field is filled with the checkin time when the item is returned.

The circulating_library field in this table refers to the checkout location. The circulating_library in the Item table refers to the item's owning library.

Non-catalogued Circulation. When a non-catalogued checkout is recorded, a record is created in this table. Non-catalogued item category can be found in the linked *Non-Cat Item Type* table.

In-house Use. Contains the catalogued item in-house use records.

Non-catalogued In-house Use. Contains the non-catalogued item in-house use records. Follow the link to *Item Type* to find the non-catalogued item category.

Copy Transit. When a copy is sent in transit, regardless of whether it is going back to its circulating library or going to fill a hold, a copy transit record is created in this table. Follow the link to *Transit Copy* to find the item information.

Hold Transit. When a copy is sent in transit to fill a hold, a hold transit record is created in this table and the *Copy Transit* table. So this table contains a subset of records of the *Copy Transit* table. You may find hold information following the link to *Hold Requiring Transit*. Follow the link to *Transit Copy* to find the item information.

Hold Request. When a hold is placed, a hold record is created in this table. You may find the hold receiver's information in *Hold User*. *Requesting User* is the person who takes the placing hold action. It can be the hold receiver or a staff member. Generally if the Hold User is different from the Requesting User, this is a staff-placed hold. *Hold Copy Map* equals *Eligible Copies*. Copies that can be used to fill the hold are in this table.

Target Object ID is shown as a link. But there is no linked table in the *Source* pane. The value in this field could be a bibilographic record id, a volume record id or a copy record id depending on the hold type.

Timestamps in this table:

Capture Date/Time: The time when the hold achieves hold shelf or hold-in-transit status.

Fulfillment Date/Time: the time when the on-hold item is checked out.

Hold Cancel Date/Time: the time when the hold is cancelled.

Hold Expire Date/Time: This could be the date calculated based on your library's default Hold Expire Interval or a selected date when placing the hold.

Last Targeting Date/Time: The last time the hold targeting program checked for a target copy for the hold. It usually has the same time as the Hold Request Time. It is usually not useful for reporting, But it may serve as an indicator of whether the request time has been edited.

Notify Time: when the email notice is sent out.

Request Date/Time: Usually this is when the hold is placed. But it is editable on the staff client. So sometimes this may be the request time chosen by the staff.

Shelf Expire Time: the date is calculated based on the Shelf Time and your library's Default Hold Shelf Expire Interval.

Shelf Time: when the hold achieves On Hold Shelf status.

Thaw Date: the activation date for a suspended hold.

Bills tables and views.

Scroll down to the bottom of the *Source* list. Hover your mouse over *All Available Sources*. A new list will pop up to the right. Move your cursor to the list and scroll down to *Billing Line Item*. This table contains all the billing line items such as each day's overdue fines and the grocery bills created manually. The records in this table are viewable on the *Full Details* screen on *Bills* in the staff client.

Billable Transaction with Billing Location: this table contains the summary records of billings and payments. Most information in these records is displayed on *Bills* or *Bills History* screen. The records are updated when either

the related billings or payments are updated. Transaction ID is the bill ID. It is also the circulation record ID for circulation bills. Transaction Start Time is the grocery bill creation time or circulation checkout time. Transaction Finish Time is when the bill is resolved.

Payments tables and views.

Payments: ALL contains all payment records. When a lump sum of payment is made on the staff client, one or more payment records are created depending on the number of bills it resolved or partially resolved. One bill may be resolved by multiple payments.

Payments: Brick-and-mortar contains all payments made at the circulation desk.

Payments: Desk: Cash/Check/Credit Card payment.

Payments: Non-drawer Staff: Forgive/Work/Goods/Patron Credit payments.

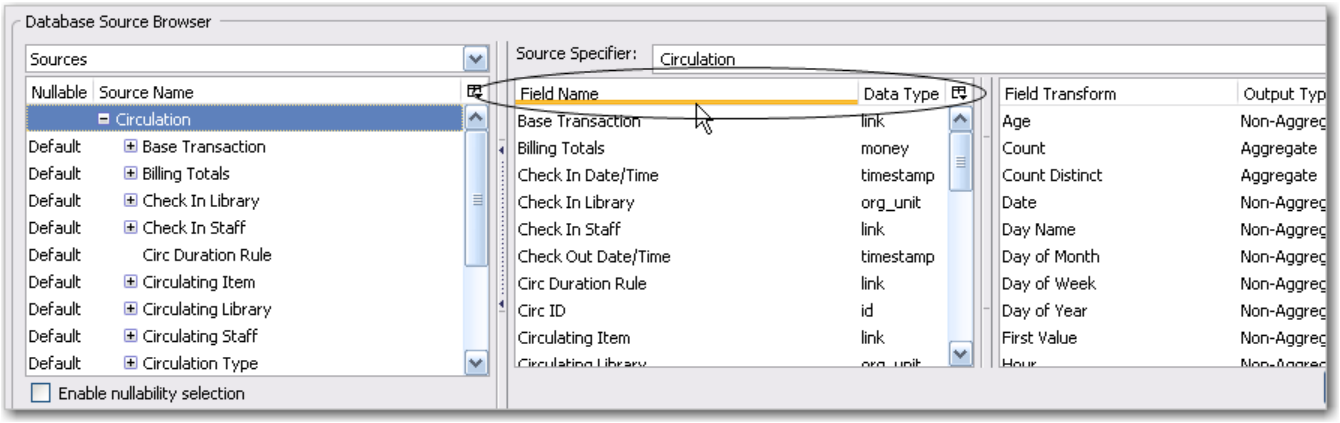
A view is a virtual table which contains records meeting defined requirements. The fields in a view can be from one or more tables. Before you use a view for your report, you need to make sure the view contains the type of records that you want to report on. For example, *Overdue Circulation* is a view which contains circulation records without checkin date and the due date past "today". It does not work for a report on last month's circulation statistics, but it makes an overdue report easier.

By default, tables are often, but not always, joined by left join. Other join types may be available. Select the *Enable nullability* checkbox under the source list on *Template Creation* screen (before linked tables are displayed) to list all available join types. You may see *None, Child, Parent, Default* in *Nullable* column beside the table names. *None* means a inner join; *Parent* is a right outer join; *Child* left outer join. *Default* is unknown, but likely left outer join.

Chapter 34. Template Terminology: Data Types, Transforms, and Operators

Data Types

The central column of the *Database Source Browser* lists *Field Name* and *Data Type* for the selected database table.



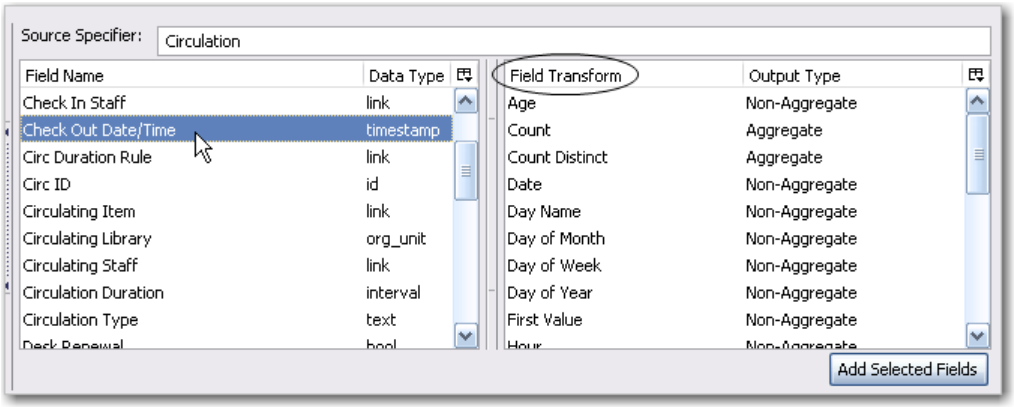
Data Type is associated with each field. It tells what kind of information is stored in the field. The system handles the information differently based on the data type. Each data type has its own characteristics and uses:

Data Type	Description	Notes
Boolean	Contains either “true” or “false”.	Examples in Evergreen: “deleted” in item/patron record, “circulate?” in item record.
ID	Unique number assigned by the database to identify a record	IDs look like numbers, but the id data type is treated specially by the software for determining how tables are linked. Id is a good candidate field for counting records.
Integer	A number like 1, 2, 3.	Examples in Evergreen: "remaining renewal count" in circulation record, "claimed returned count" in patron record.
Interval	Time intervals, such as “2 weeks” and “6 months”	Examples in Evergreen: “loan duration” and "grace period" in circulation record,
Link	It is similar to the id data type. It is the id of a record in another table.	Examples in Evergreen: "user id" and "item id" in a circulation record. *Link* outputs a number that is a meaningful reference for the database but not of much use to a human user. You will usually want to drill further down the tree in the *Sources* pane and select fields from the linked table. However, in some instances you might want to use a *link* field. For example, to count the number of patrons who borrowed items you could do a count on the "user id" in the circulation record.
Money	Monetary amount	Examples in Evergreen: "price" in item record, "billing amount" in billing record.
Org_unit	Organizational unit. It is a number. It acts like link data type.	In Evergreen, libraries are organizational units. In Sitka context they are organized into a tree structure with consortium, library federations, libraries/library systems and

Data Type	Description	Notes
		branches for library systems. To filter on a library, make sure you choose the field having org_unit data type. To display a library, it is a better option to drill down to the org unit record to display the "name" of it.
Text	Text field. Usually it takes whatever is typed into the field.	Examples: "call number label" in call number record, "patron's names".
Timestamp	A very detailed time such as 2007-11-25 17:54:26-07	Example: checkout time in circulation record, last status date in item record.

Field Transforms

Transforms determine how data is processed when it is retrieved from the database. Different data types can be transformed differently. Not all transforms are available to a certain data type.



Raw Data. To display the data exactly as it is stored in the database. It is available to all data types.

Date. This transform presents a timestamp as a human-readable date in yyyy-mm-dd format. For example, timestamp 2007-11-25 17:54:26-07 will be displayed as 2007-11-25. Date is available to timestamp field.

Year + Month. Presents a timestamp as the year and month in yyyy-mm format. For example, 2007-11-25 17:54:26-07 will be displayed as 2007-11. If filtering on a timestamp transformed to *Year + Month*, all days in the calendar month are included. It is available to timestamp field.

Upper Case/Lower Case. Transforms text to all upper/lower case. They are only available for the text data type.

Substring. This transform can be applied to filters, not display fields. It matches the given value with a continuous string of characters in the field. For example, if a given value is "123' and the match is with a call number field, call numbers like '123.34', 'ANF 123.34', 'JNF 233.123', etc. will be in the result list. Substring is only available to text data type.

First Continuous Non-space string. The first word (or string of numbers and/or characters until the first spacing) in a field is returned by this transform. For example, this transform will return "E" from text "E DOR", "E 123", etc. This transform is available to the text data type.

Count. This transform counts the records found. Though you can count by any field, very often id field is used. Count is available to text, integer, id, money, and timestamp.

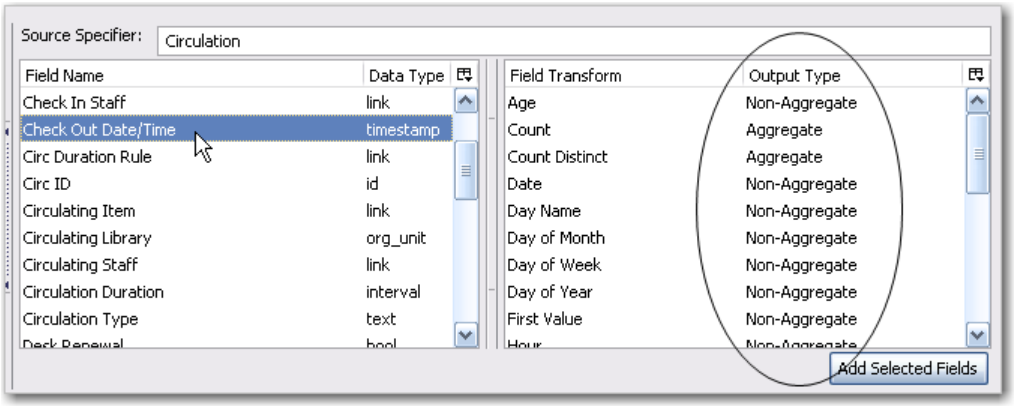
Count Distinct. This transform counts the number of records with unique value in the field. If two records have the same value in the field, they will be counted once only. A typical example of using Count Distinct is counting the number of active patrons who borrowed items at a library. Each patron can be counted once only but he/she may borrow multiple items. Transforming the patron id in circulation record with Count Distinct will result in the required number. Since each patron has a unique id, she/her will be counted once only. Count Distinct is available to text, integer, id, money, and timestamp.

Max. It compares the values in the field of all result records and then returns the one record with the highest value. Max is available to text, integer, money, and timestamp. For timestamp the highest value means the latest date. For example, if a checkout date is transformed by Max, the returned date is the last checkout date.

Min. It works the same way as Max except that it returns the lowest value. Min is available to text, integer, money, and timestamp.

Output Type

Note that each transform has either an *Aggregate* or *Non-Aggregate* output type.



Whether an output is *Non-Aggregate* or *Aggregate* depends on whether the output value relies on a single record or several records. It is *Non-Aggregate* if the result is strictly from a single record, while it is *Aggregate* if it is from several records. For example, the value of Count transform of circulation id will increase by 1 whenever a record is found. So the output is *Aggregate*. The output of Max transform of checkout date is technically not aggregated, but there may be several records invovled before the highest value is deterrmined.

When used as filters, non-aggregate and aggregate types correspond to *Base* and *Aggregate* filters respectively. To see the difference between a base filter and an aggregate filter, imagine that you are creating a report to find out the popular items that were circulated more than 3 times last month. This would require a base filter to specify the month of interest and an aggregate filter on the count of circulation record on each item.

Operators

Operators describe how two pieces of data can be compared to each other. They are used when creating filters in a template to determine which records should be included in the result. The record is included when the comparation returns "TRUE". The possible ways of comparing data are related to data type and data transforms. Below are some commonly used operators.

Equals. Compares two operands and returns TRUE if they are exactly the same.

In List. It is similar to Equals, except it allows you specify multiple parameters and returns "TRUE" if the field is equal to any one of the given values.

Not In List . It is the opposite of In List. Multiple parameters can be specified. TRUE will be returned only when none of the parameters is matched with the value in the field.

Greater Than. This operator returns TRUE if a field is greater than your parameter. For text fields, the string is compared character by character in accordance with the general rule that numerical characters are smaller than alphabetical characters and upper case alphabeticals are smaller than lower case alphabeticals; for timestamps “Greater Than” can be thought of as “later than” or "after".

Less Than. This operator returns TRUE if a field is less than, lower than, earlier than or smaller than your parameter.

Between. Two parameters are required by this operator. TRUE is returned when the field value is Greater Than or Equal to the smaller given value and Less Than or Equal to the bigger given value. The smaller parameter should always comes first when filling in a filter with this operator. For example: between 3 and 5 is correct. Between 5 and 3 will return FALSE on the Reports interface. For timestamp earlier date always comes first.

Is NULL or Blank. Returns TRUE for fields that contain no data or blank string. For most intents and purposes this operator should be used when there is no visible value in the field.

Contains Matching Substring. This operator checks if any part of the field matches the given parameter. It is case-sensitive.

Contains Matching Substring (Ignore Case). This operator is identical to Contains Matching Substring, except it is not case-sensitive.

Part VI. Serials

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Chapter 35. Serials

Adapted with permission from original material by the Evergreen Community

This documentation is intended for users who will be ordering subscriptions, distributing issues, and receiving issues in Sitka Evergreen. The described processes have been tested by Sitka support in Sitka's shared environment and are the sole supported workflow for serials in Sitka Evergreen. Sitka support strongly recommends adherence to this prescribed workflow.

35.1. Serials Videos

1. **Introduction to Serials**: This 2 minute video provides a brief overview of the serials module

   Click here to view the video

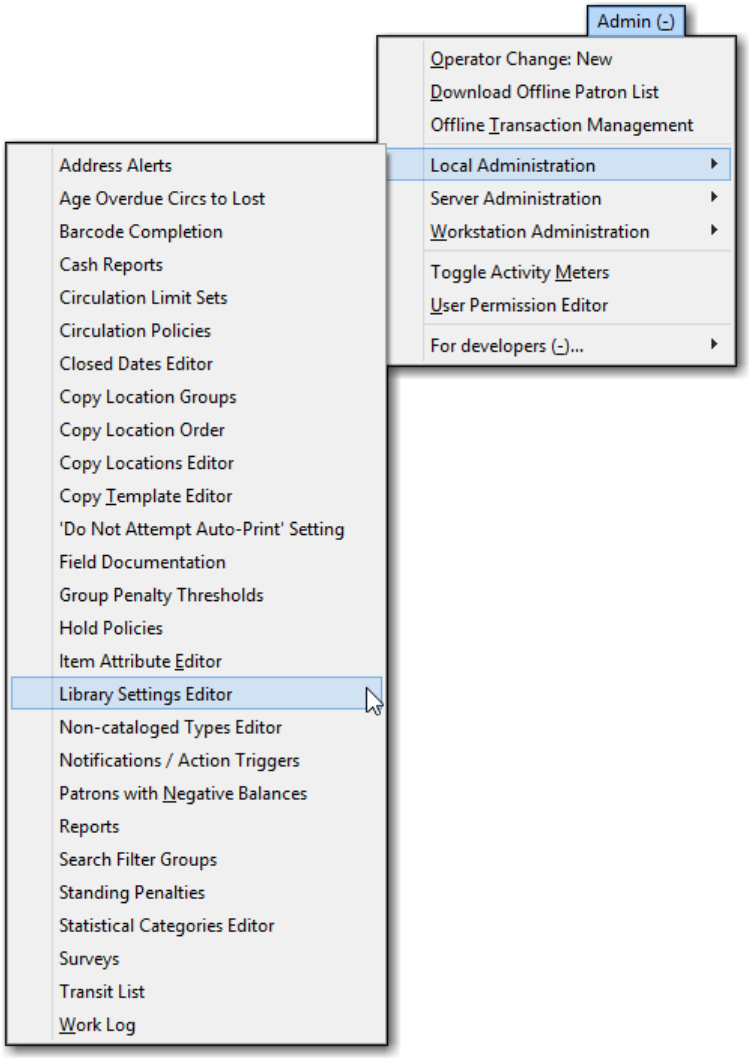
2. **Serials Tutorial in Sitka Evergreen**: This 10 minute video outlines the basic procedure for creating a subscription and receiving Issues.

   Click here to view the video

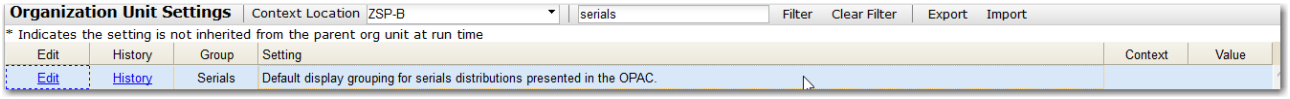
35.2. Administration

The following settings will need to be configured in the *Library Settings Editor* before you start using the Serials module.

1. Click *Admin* → *Local Administration* → *Library Settings Editor*.



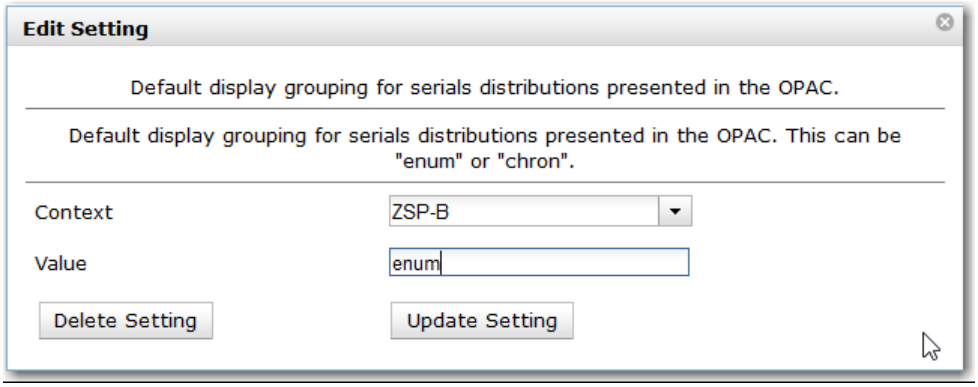
2. Search or scroll to find *Serials: Default display grouping for serials distributions presented in the OPAC.*



3. Click *Edit*.

4. Edit the setting as follows.

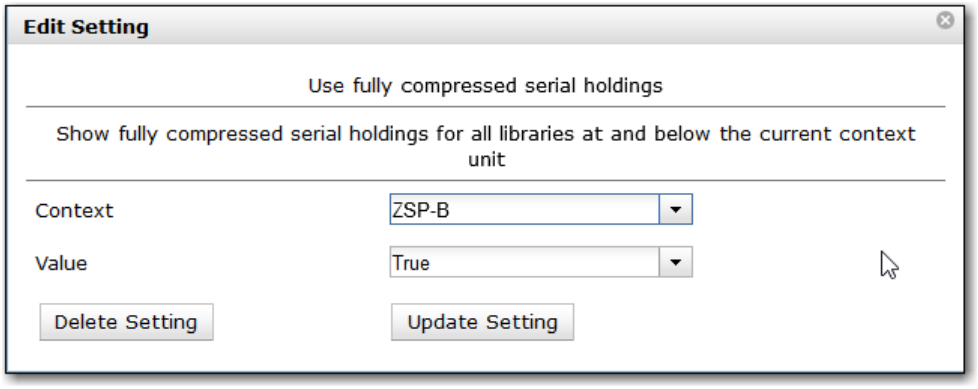
   - Context: By default your library is selected.
   - Value: Enter enum to display issues by enumeration. This value will become your default setting for display issues in the OPAC.


Edit Setting
Default display grouping for serials distributions presented in the OPAC.
Default display grouping for serials distributions presented in the OPAC. This can be "enum" or "chron".
Context
ZSP-B
Value
enum
Delete Setting
Update Setting

5. Click *Update Setting.*
6. Search or scroll to find *OPAC: Use fully compressed serials holdings.*.

7. Click *Edit.*
8. Edit the setting as follows.

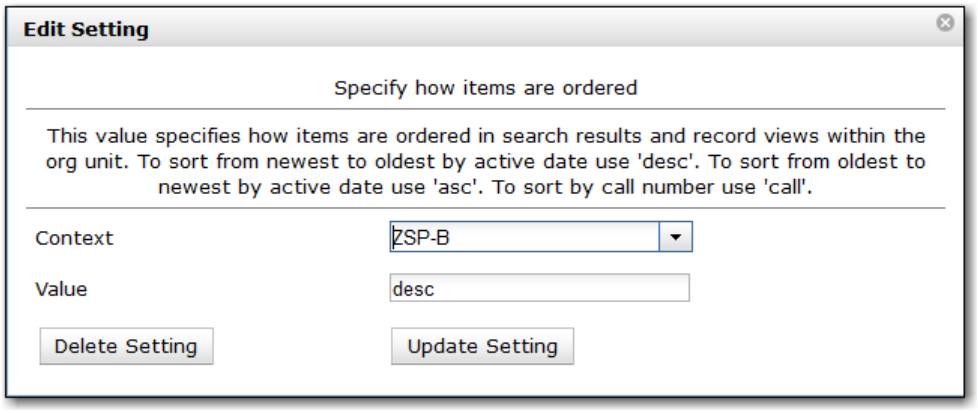
   - Context: By default your library is selected.
   - Value: Select *True* from the dropdown menu to view a compressed holdings statement.



9. Click *Update Setting.*
10. Search or scroll to find *OPAC: Specify how items are ordered.*

11. Click *Edit.*

12. Edit the setting as follows.
    - Context: By default your library is selected.
    - Value: Choose one of the following
        - desc: To sort from newest to oldest by active date
        - asc: To sort from oldest to newest by active date
        - call: To sort by call number


Edit Setting
Specify how items are ordered
This value specifies how items are ordered in search results and record views within the org unit. To sort from newest to oldest by active date use 'desc'. To sort from oldest to newest by active date use 'asc'. To sort by call number use 'call'.
Context
ZSP-B
Value
desc
Delete Setting
Update Setting

13. Click *Update Setting.*

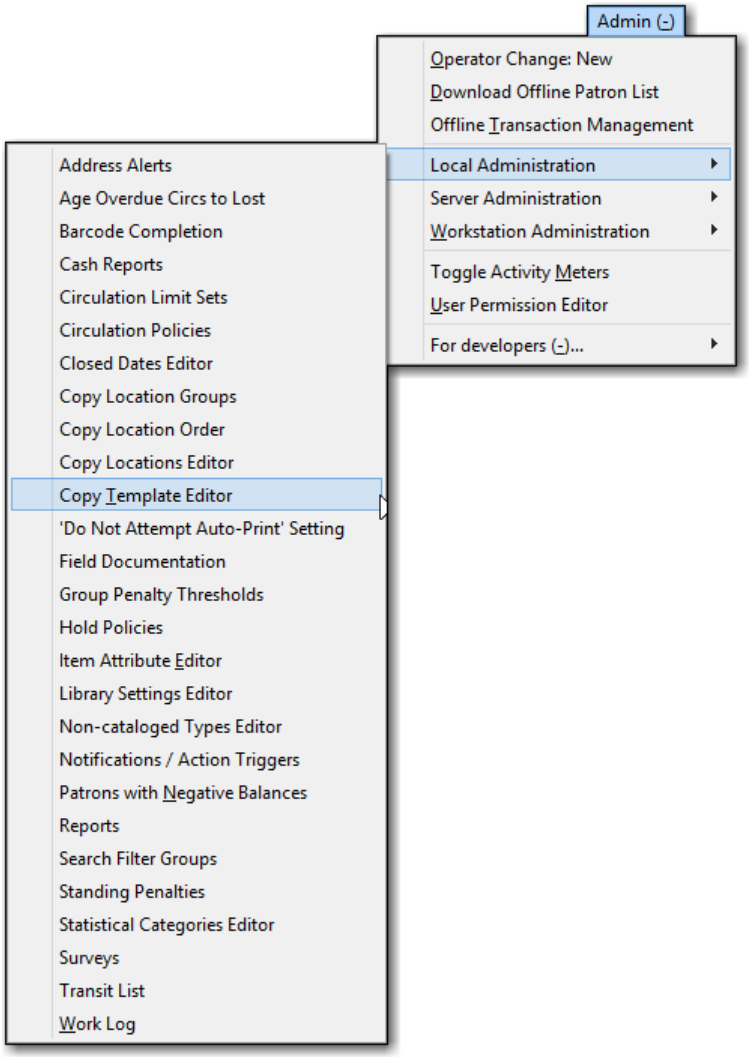
Chapter 36. Copy Template

36.1. Create a Copy Template

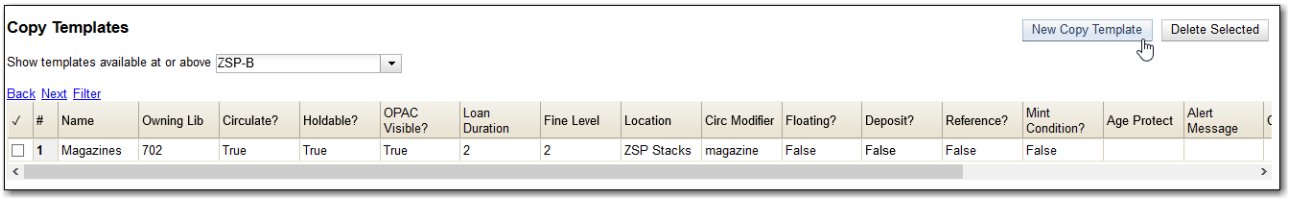
You must create at least one template in order to receive serials.

A copy template enables you to specify item attributes that should be applied by default to all copies of serials. You can create one copy template and apply it to multiple serials or you can create multiple templates. For example, you may want to create one copy template for Popular Magazines and one template for Juvenile Magazines.

1. Select *Admin* → *Local Administration* → *Copy Template Editor*.



2. Click on *New Copy Template.*


Copy Templates
New Copy Template
Delete Selected
Show templates available at or above ZSP-B
Back Next Filter
✓ # Name Owning Lib Circulate? Holdable? OPAC Visible? Loan Duration Fine Level Location Circ Modifier Floating? Deposit? Reference? Mint Condition? Age Protect Alert Message
1 Magazines 702 True True True 2 2 ZSP Stacks magazine False False False False

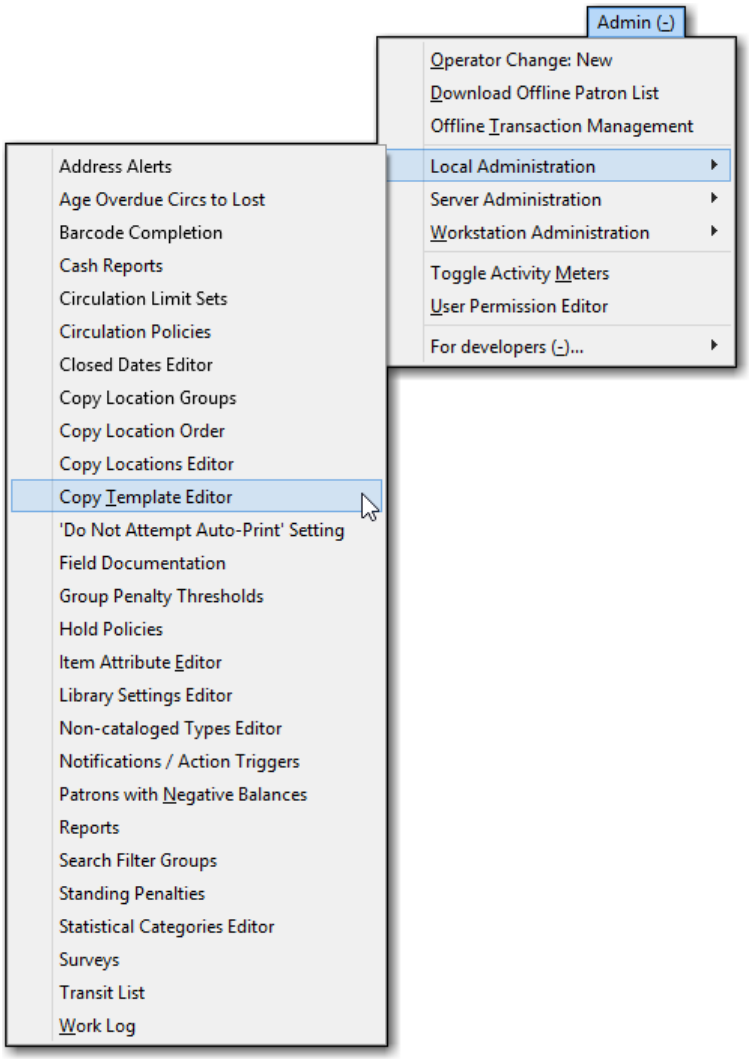
3. Enter parameters for your new copy template.

4. Click *Save*.

36.2. Edit a Copy Template

You can make changes to an existing copy template. Changes that you make to a copy template will apply to any items that you receive after you edited the template.

1. Select *Admin* → *Local Administration* → *Copy Template Editor*.



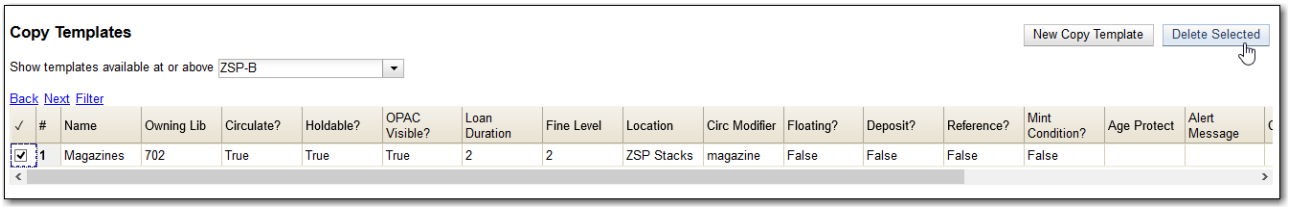
2. Double-click in the row of the template you want to edit. The copy template will appear, and you can edit the fields.

3. After making changes, click *Save*.

36.3. Delete a Copy Template

You can only delete a copy template that has **never been used**.

1. Check the box beside the copy template you would like to delete
2. Click on *Delete Selected.*


Copy Templates
New Copy Template
Delete Selected
Show templates available at or above ZSP-B
Back Next Filter
✓ # Name Owning Lib Circulate? Holdable? OPAC Visible? Loan Duration Fine Level Location Circ Modifier Floating? Deposit? Reference? Mint Condition? Age Protect Alert Message
1 Magazines 702 True True True 2 2 ZSP Stacks magazine False False False False

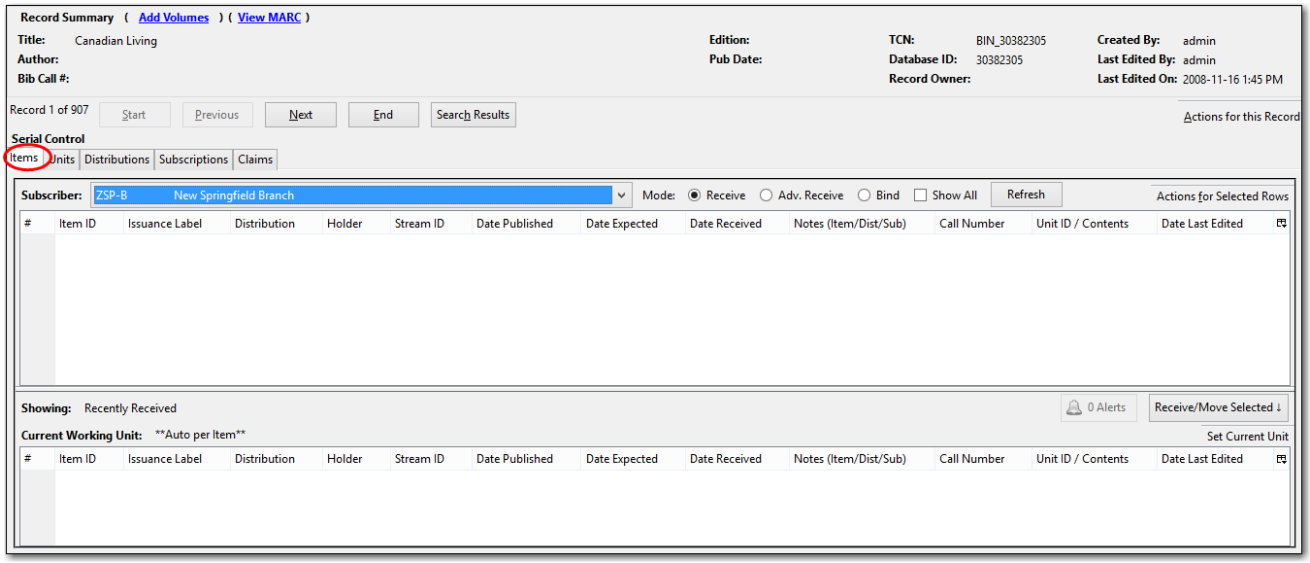
3. The copy template is now deleted

Chapter 37. Creating Serial Records

37.1. Serial Control View

The Serial Control view enables you to manage serials in a single tabbed interface. Serial Control view consists of five tabs.

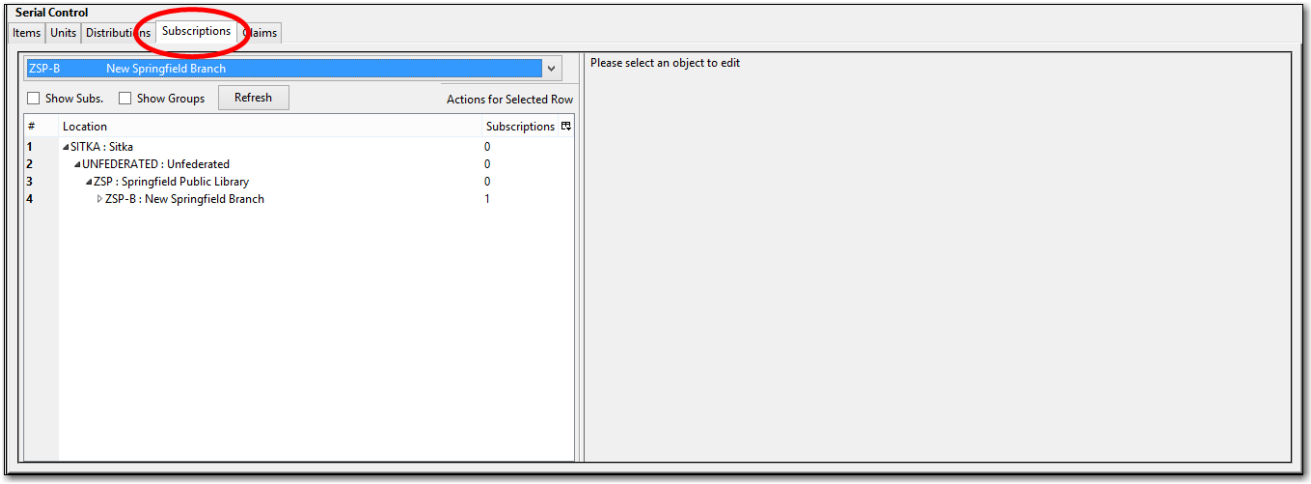
1. **Items: Used to receive issues.**.


Record Summary (Add Volumes) (View MARC)
Title: Canadian Living
Author:
Bib Call #:
Edition:
Pub Date:
TCN: BIN_30382305
Database ID: 30382305
Record Owner:
Created By: admin
Last Edited By: admin
Last Edited On: 2008-11-16 1:45 PM
Record 1 of 907
Start
Previous
Next
End
Search Results
Actions for this Record
Serial Control
Items
Units
Distributions
Subscriptions
Claims
Subscriber: ZSP-B New Springfield Branch
Mode: Receive Adv. Receive Bind Show All
Refresh
Actions for Selected Rows
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Notes (Item/Dist/Sub) Call Number Unit ID / Contents Date Last Edited
Showing: Recently Received
0 Alerts
Receive/Move Selected
Current Working Unit: **Auto per Item**
Set Current Unit
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Notes (Item/Dist/Sub) Call Number Unit ID / Contents Date Last Edited

2. Units: Not currently used.

3. Distributions: Can be used to create and manage distributions or streams. We recommend that you access this information under the Subscriptions tab.

4. **Subscriptions: Used to create and manage subscriptions.**.



5. Claims: Not currently used.

37.2. Managing Serials Records

Create a Subscription

Create a Distribution

Create Captions and Patterns

Pattern Code Wizard

Create an Issuance

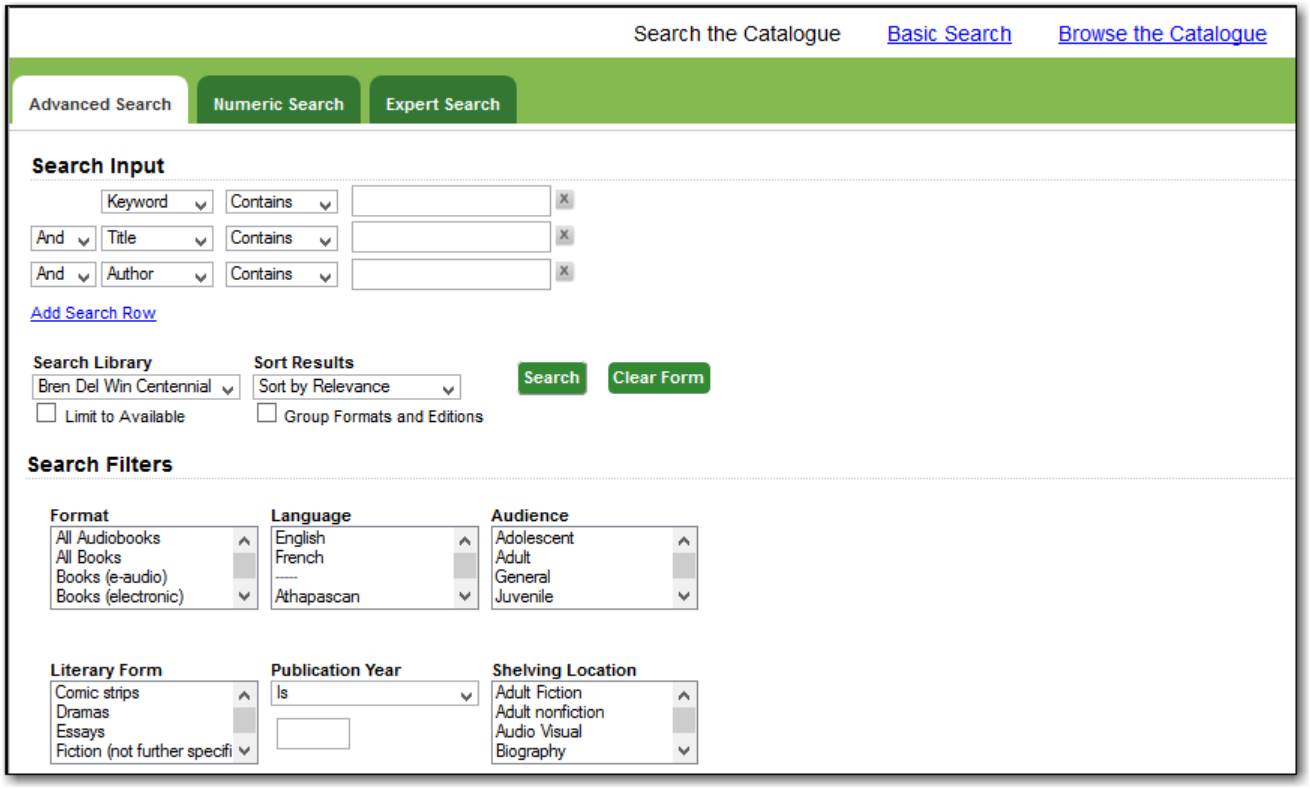
Generate Predictions

37.2.1. Create a Subscription

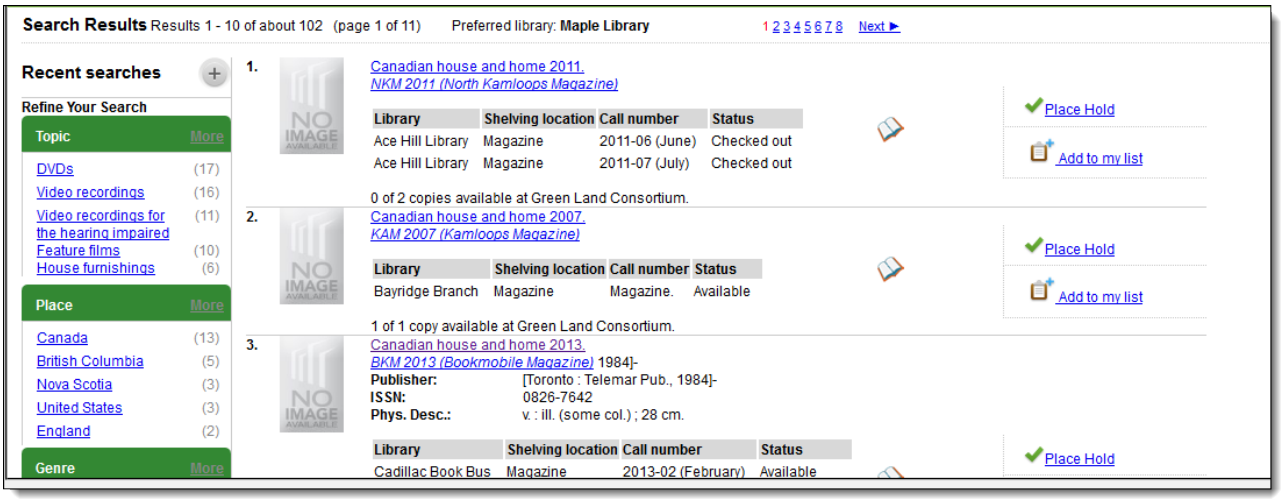
A subscription is designed to hold all information related to a single serial title. Therefore, each library is likely to have only one subscription per serial title.

A subscription must be added to a catalogue record, so to start you must locate the record in the catalogue. If the record is not already in the catalogue, you can import it via any of your preferred methods (MARC import, Z39.50 search, etc.)

1. Search the catalogue. **(F3)**

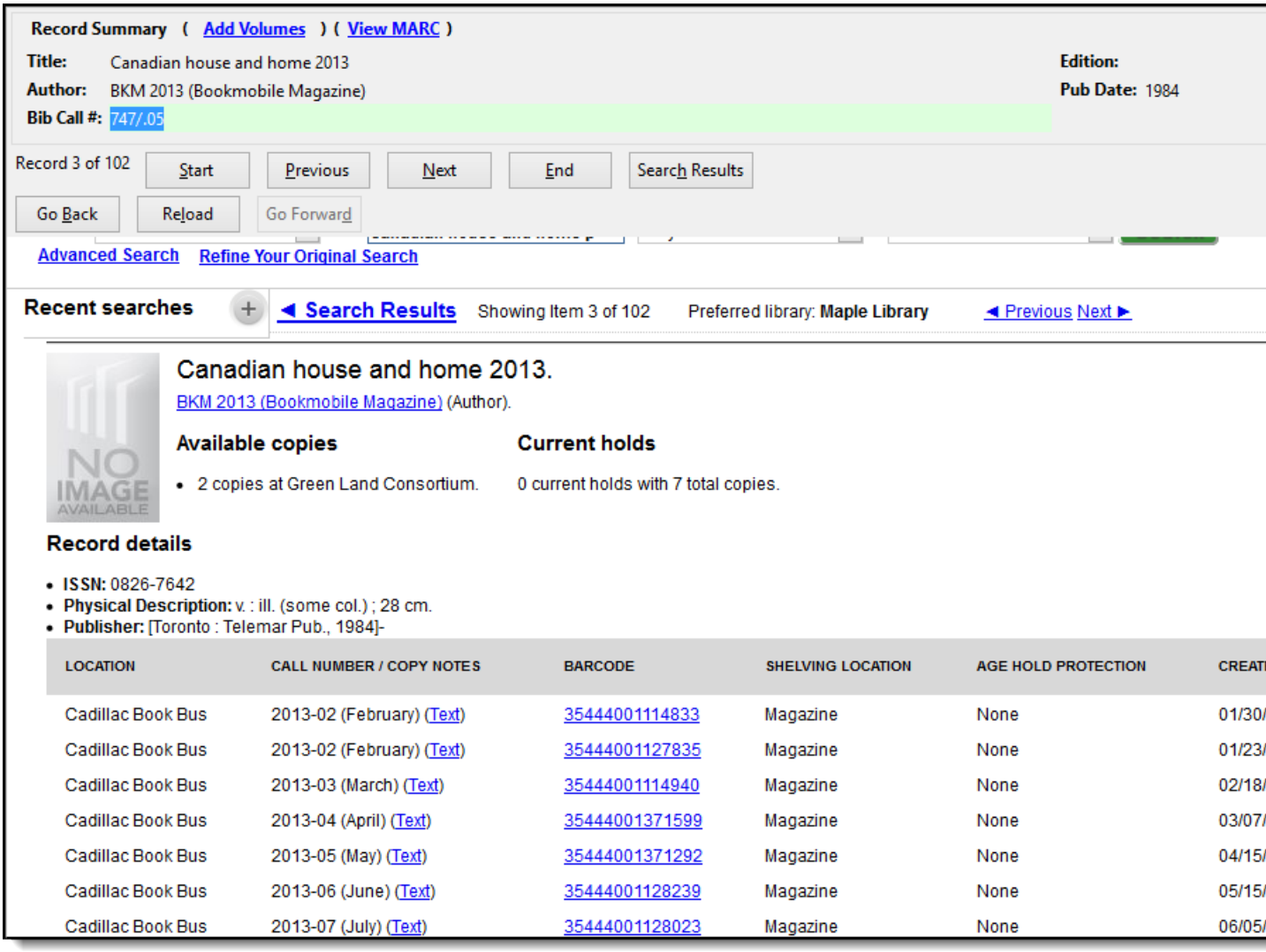


2. Select the bibliographic record for the magazine or periodical.

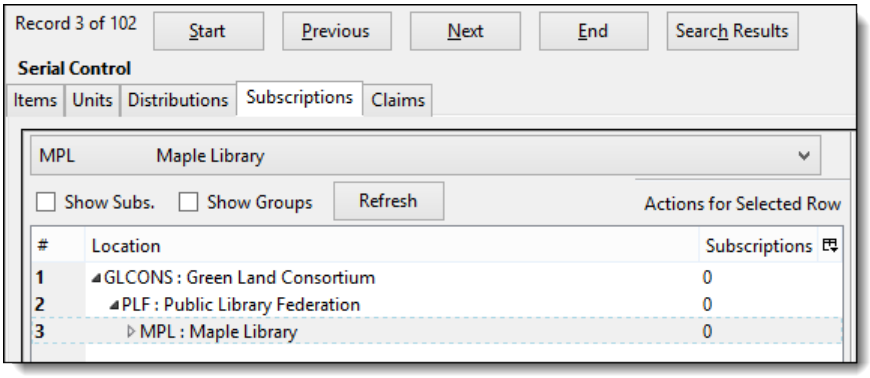

Search Results Results 1 - 10 of about 102 (page 1 of 11) Preferred library: Maple Library
1 2 3 4 5 6 7 8 Next ►
Recent searches
Refine Your Search
Topic More
DVDs (17)
Video recordings (16)
Video recordings for the hearing impaired (11)
Feature films (10)
House furnishings (6)
Place More
Canada (13)
British Columbia (5)
Nova Scotia (3)
United States (3)
England (2)
Genre More
1.
Canadian house and home 2011.
NKM 2011 (North Kamloops Magazine)
Library Shelving location Call number Status
Ace Hill Library Magazine 2011-06 (June) Checked out
Ace Hill Library Magazine 2011-07 (July) Checked out
0 of 2 copies available at Green Land Consortium.
Place Hold
Add to my list
2.
Canadian house and home 2007.
KAM 2007 (Kamloops Magazine)
Library Shelving location Call number Status
Bayridge Branch Magazine Magazine. Available
1 of 1 copy available at Green Land Consortium.
Place Hold
Add to my list
3.
Canadian house and home 2013.
BKM 2013 (Bookmobile Magazine) 1984]-
Publisher: [Toronto : Telemar Pub., 1984]-
ISSN: 0826-7642
Phys. Desc.: v. : ill. (some col.) ; 28 cm.
Library Shelving location Call number Status
Cadillac Book Bus Magazine 2013-02 (February) Available
Place Hold

3. Click on the title to open the *Record Details* screen.

4. Click on *Actions for this Record* and select *Serial Control View*.

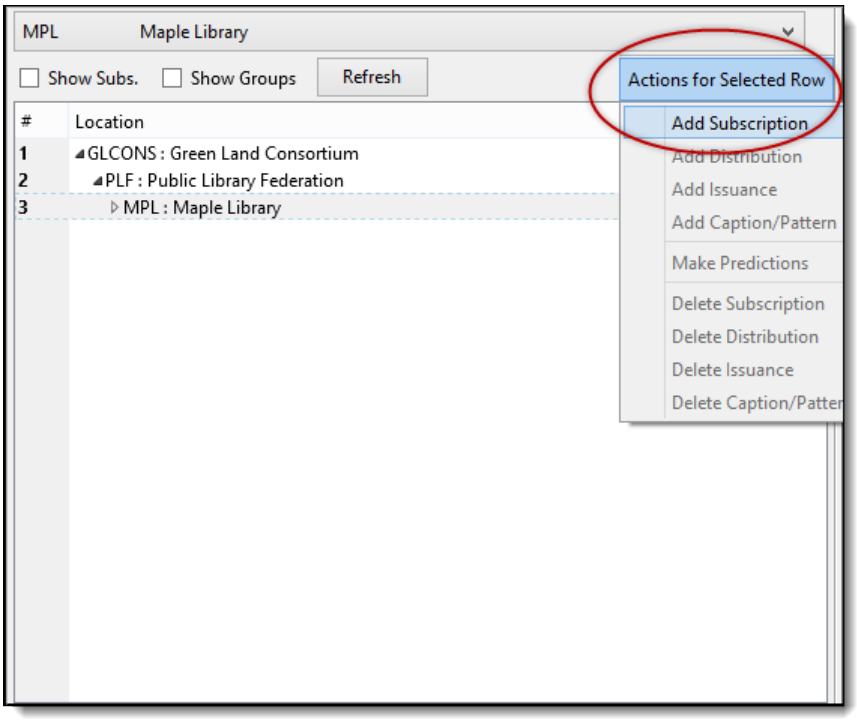

Record Summary (Add Volumes) (View MARC)
Title: Canadian house and home 2013
Author: BKM 2013 (Bookmobile Magazine)
Bib Call #: 747/.05
Edition:
Pub Date: 1984
Record 3 of 102
Start
Previous
Next
End
Search Results
Go Back
Reload
Go Forward
Advanced Search
Refine Your Original Search
Recent searches
Search Results
Showing Item 3 of 102
Preferred library: Maple Library
Previous Next
NO IMAGE AVAILABLE
Canadian house and home 2013.
BKM 2013 (Bookmobile Magazine) (Author).
Available copies
2 copies at Green Land Consortium.
Current holds
0 current holds with 7 total copies.
Record details
ISSN: 0826-7642
Physical Description: v. : ill. (some col.) ; 28 cm.
Publisher: [Toronto : Telemar Pub., 1984]-
LOCATION
CALL NUMBER / COPY NOTES
BARCODE
SHELVING LOCATION
AGE HOLD PROTECTION
Cadillac Book Bus 2013-02 (February) (Text) 35444001114833 Magazine None 01/30/
Cadillac Book Bus 2013-02 (February) (Text) 35444001127835 Magazine None 01/23/
Cadillac Book Bus 2013-03 (March) (Text) 35444001114940 Magazine None 02/18/
Cadillac Book Bus 2013-04 (April) (Text) 35444001371599 Magazine None 03/07/
Cadillac Book Bus 2013-05 (May) (Text) 35444001371292 Magazine None 04/15/
Cadillac Book Bus 2013-06 (June) (Text) 35444001128239 Magazine None 05/15/
Cadillac Book Bus 2013-07 (July) (Text) 35444001128023 Magazine None 06/05/

5. Click on the *Subscriptions* tab.



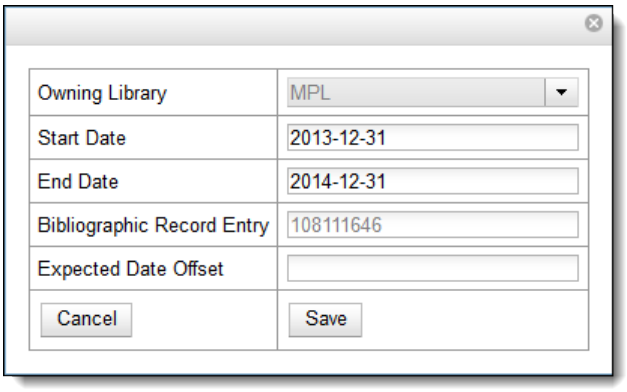
6. Select the branch that will own the subscription. (Your Library).

7. Click on *Actions for Selected Row* , and select *Add Subscription.*



8. Complete the subscription information.

- Owning Library: This field is automatically populated with the library you selected in step 5.
- Start Date: Use the calendar to select the date that the subscription begins, and click *Apply.*
- End Date: Enter the date that the subscription ends. (**This date is required to generate renewal reports**)
- Bibliographic Record Entry: This field is automatically populated with the record ID of the bibliographic record.
- Expected Date Offset: **(Optional)** Enter the difference between the nominal publishing date of an issue and the date that you expect to receive your copy. For example, if an issue is published the first day of each month, but you receive the copy two days prior to the publication date, then enter -2 days into this field.



9. Click *Save.*

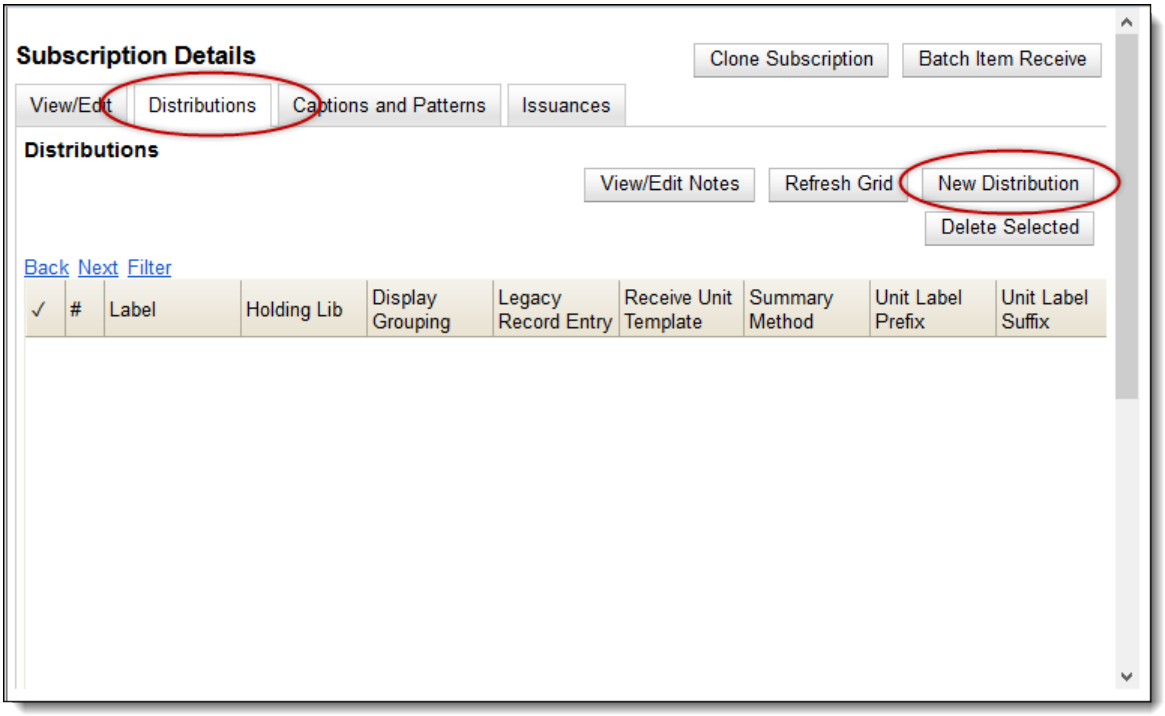
37.2.2. Create a Distribution

You must create a distribution to indicate:

- Which branches should receive copies of a serial.
- The number of copies that should be sent to each branch.

To create a distribution:

1. Click on the Distribution tab
2. Click on *New Distribution*

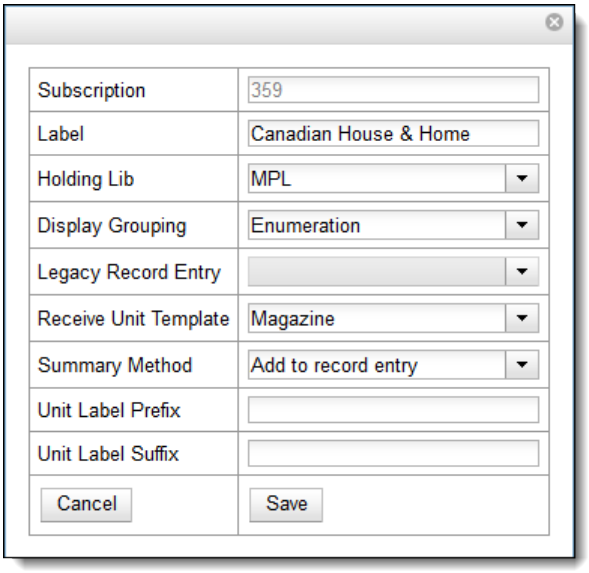


3. Complete the Distribution information.
   - Apply a new label to the distribution. Example: Magazine Title or Branch Code MPL. Click *Apply*.

If you are creating multiple distributions (multiple copies of each issue) the name of the label becomes more important. Multi branch libraries setting up a subscription at a system level will want to use the branch code as the label to easily determine which copy is sent to each branch.

   - The holding library is filled in by default and is the library to which you attached the subscription.
   - Display Grouping should be set to Enumeration
   - Receive Unit Template: This is the template that should be applied to copies when they are received. Select a template from the drop down menu and click *Apply.*

If you have not yet created a serial copy template please refer to 35.1 Create a Copy Template



4. Click *Save.*

Instruction on how to setup a Routing List can be found here Serials Routing

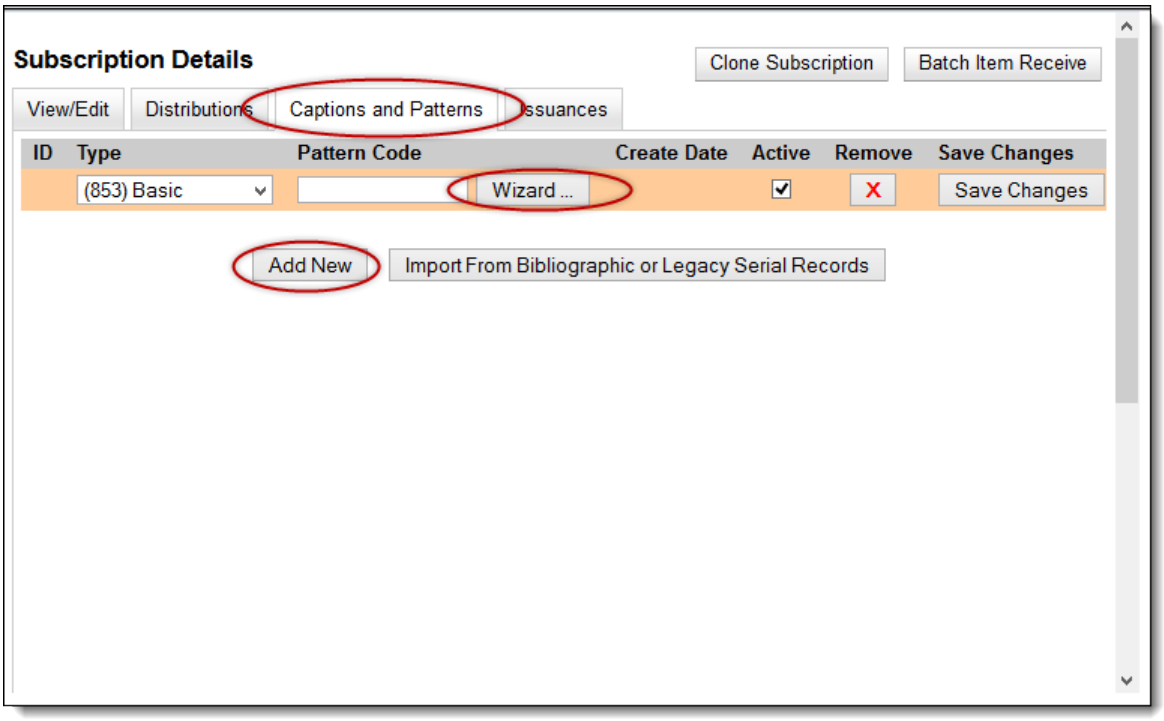
37.2.3. Create Captions and Patterns

Caption and Pattern objects define the same material that would be described in an 853, 854, or 855 MARC tag. Here you define how your issues will be captioned and how often you get them.

1. Click on the Captions and Patterns tab.

2. Click the *Add New* button.

3. Click *Wizard*.



Alternatively you can copy and paste a Caption and Pattern string into the empty **Pattern Code** box. See Section 44.1, “Caption and Pattern Codes” for a list of pre-defined *Caption/Pattern* strings to choose from.

Sitka support has created pattern codes for many popular periodicals / magazines. Whenever possible please use the pattern codes created by Sitka support. If your periodical / magazine is not in the list, contact Sitka support, or create a pattern using the *Pattern Code Wizard.*

37.2.4. Edit Captions and Patterns

If the publication pattern changes you will need to delete the current caption/pattern information and enter a new caption/pattern as well as a new "dummy issuance"

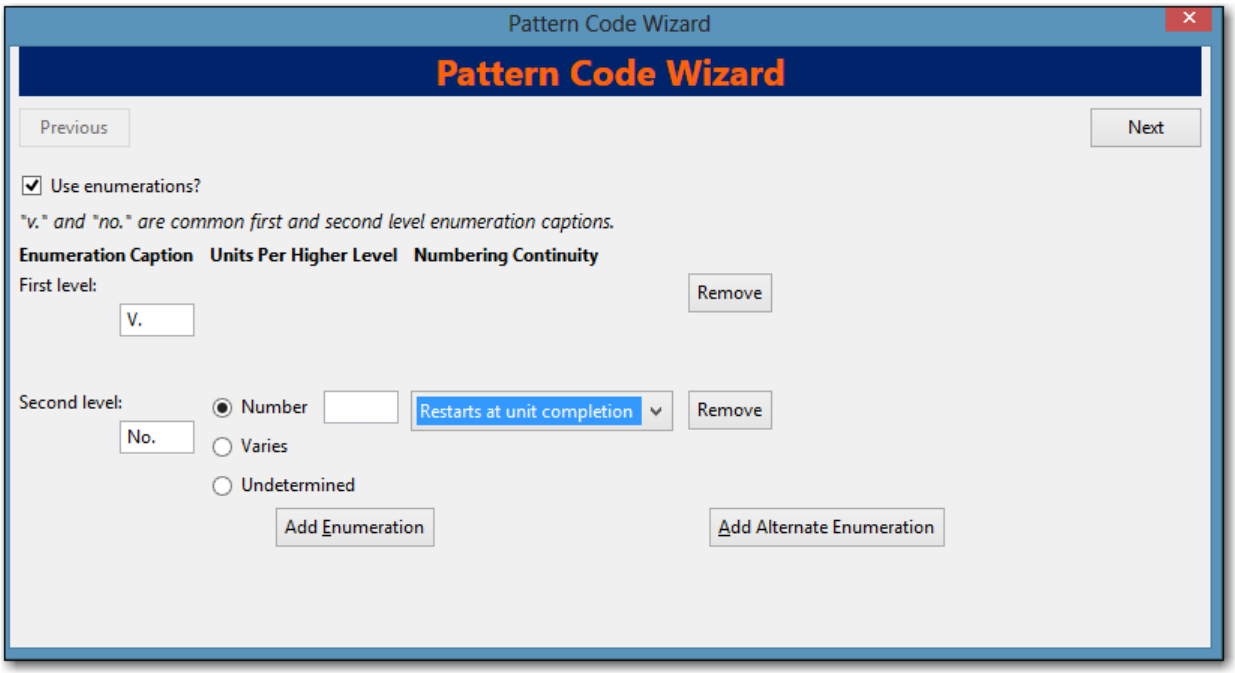
1. Click the arrow beside the subscription
2. Click the *Captions/Patterns* row beneath the subscription.
3. Click the row with the Caption/Pattern #
4. Click in the "Pattern Code" box and paste the new pattern code, or click on the button for *Pattern Code Wizard* to create a new pattern string.
5. Click on *Modify Caption and Pattern*
6. Add an Issuance as per Section 37.2.6, “Create an Issuance ”
7. Make predictions as per Section 37.2.7, “Generate Predictions”

37.2.5. Pattern Code Wizard

1. Click on the *Pattern Code Wizard* button.

2. Enumerations:

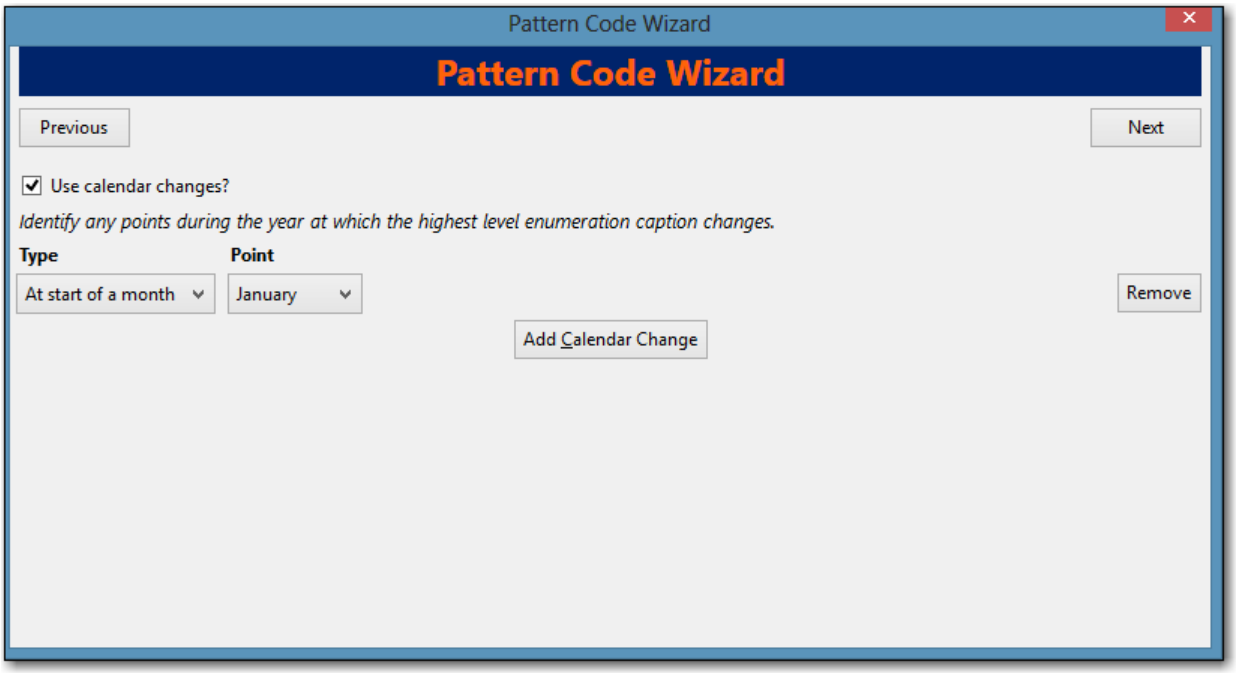
   - To add an enumeration, check the box adjacent to *Use enumerations?*
   - A field for the First level will appear. Enter the enumeration for the first level. A common first level enumeration is volume,vol., or "v".
   - Click *Add Enumeration.*
   - A field for the second level will appear. Enter the enumeration for the second level. A common second level enumeration is number, or “no.”
   - Enter the number of bibliographic units per next higher level.
   - Choose the enumeration scheme from the drop down menu.



3. Calendar:

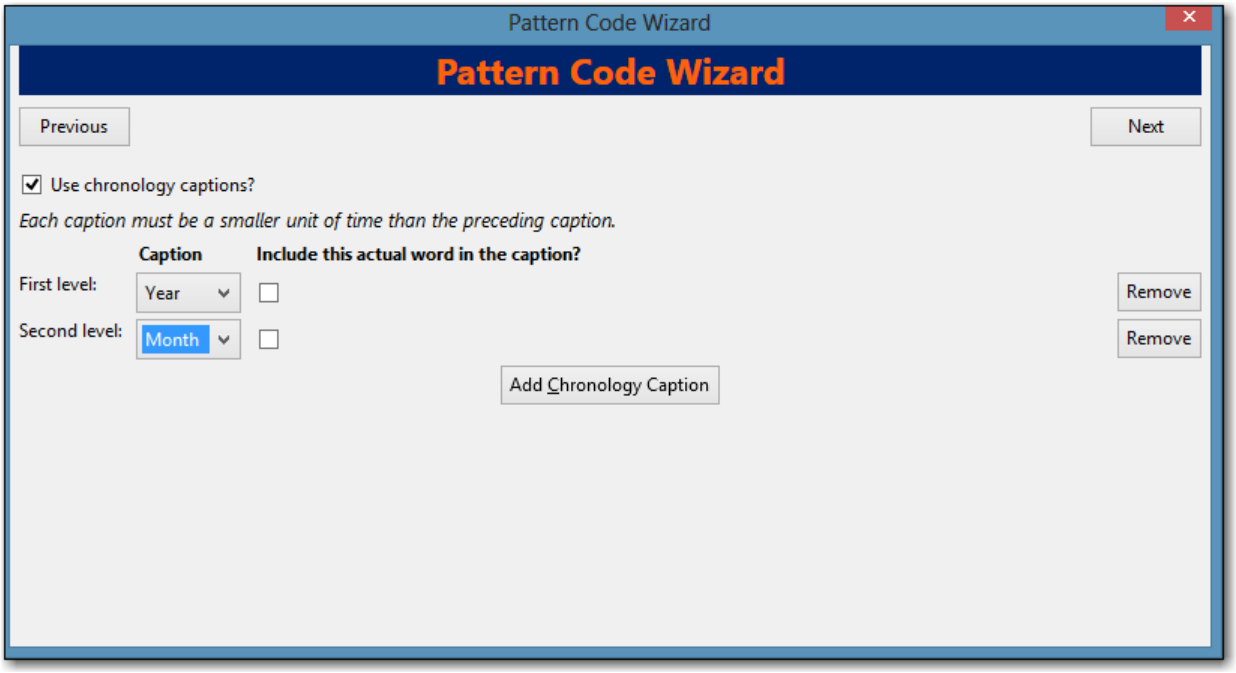
   - To use months, seasons, or dates in your caption, check the box adjacent to *Use calendar changes?*
   - Identify the point in the year at which the highest level enumeration caption changes.
   - In the *Type* drop down menu, select the points during the year at which you want the calendar to restart.
   - In the *Point* drop down menu, select the specific time at which you would like to change the calendar.
   - To add another calendar change, click *Add Calendar Change*. There are no limits on the number of calendar changes that you can add.

- When you have finished the calendar changes, click *Next*.



4. Chronology:

   - To add chronological units to the captions, check the box adjacent to *Use chronology captions?*
   - Choose a chronology for the first level. If you want to display the terms such as “year” and “month” next to the chronology caption in the catalogue, then check the box beneath *Display in holding* field.
   - To include additional levels of chronology, click *Add Chronology Caption*. Each level that you add must be smaller than the previous level.
   - After you have completed the chronology caption, click *Next*.



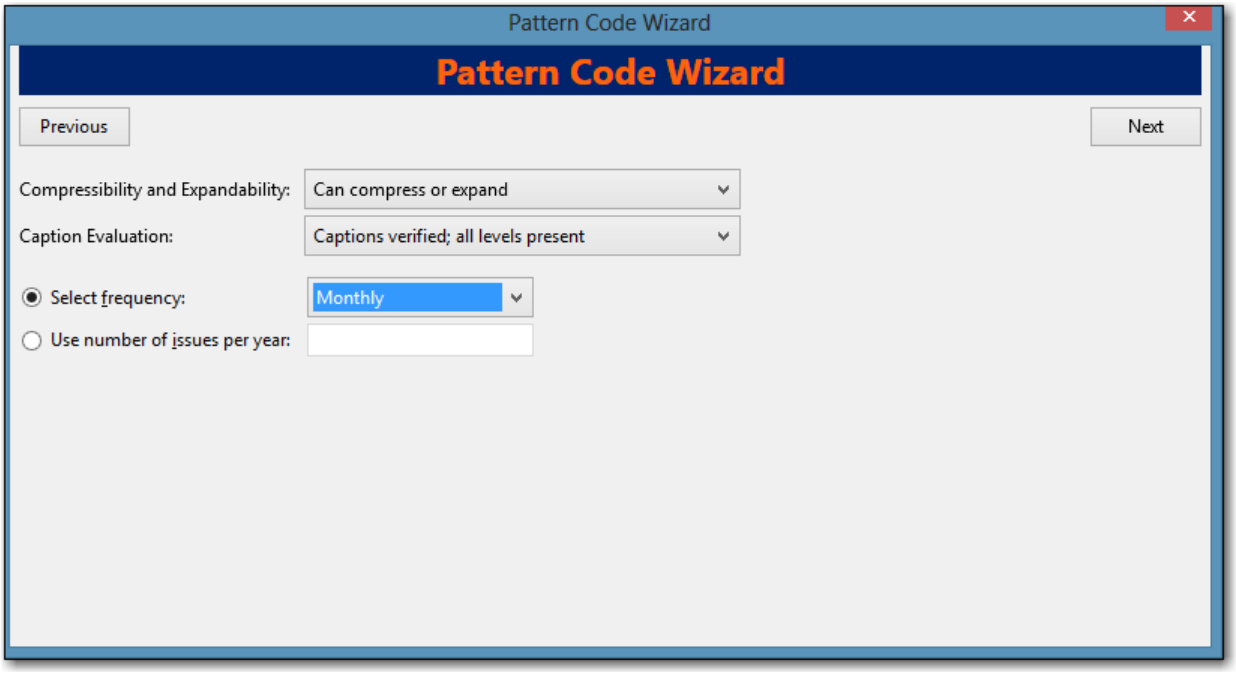
5. Compress and Expand Captions

   - Select the appropriate option for compressing or expanding your captions in the catalogue from the *Compressibility and Expandability* drop down menu.

   - Choose the appropriate caption evaluation from the drop down menu.

   - Choose the frequency of your publication from the drop down menu. For irregular frequencies, you may wish to select *Use number of issues per year:*, and enter the total number of issues that you receive each year.

   - Click *Next*.

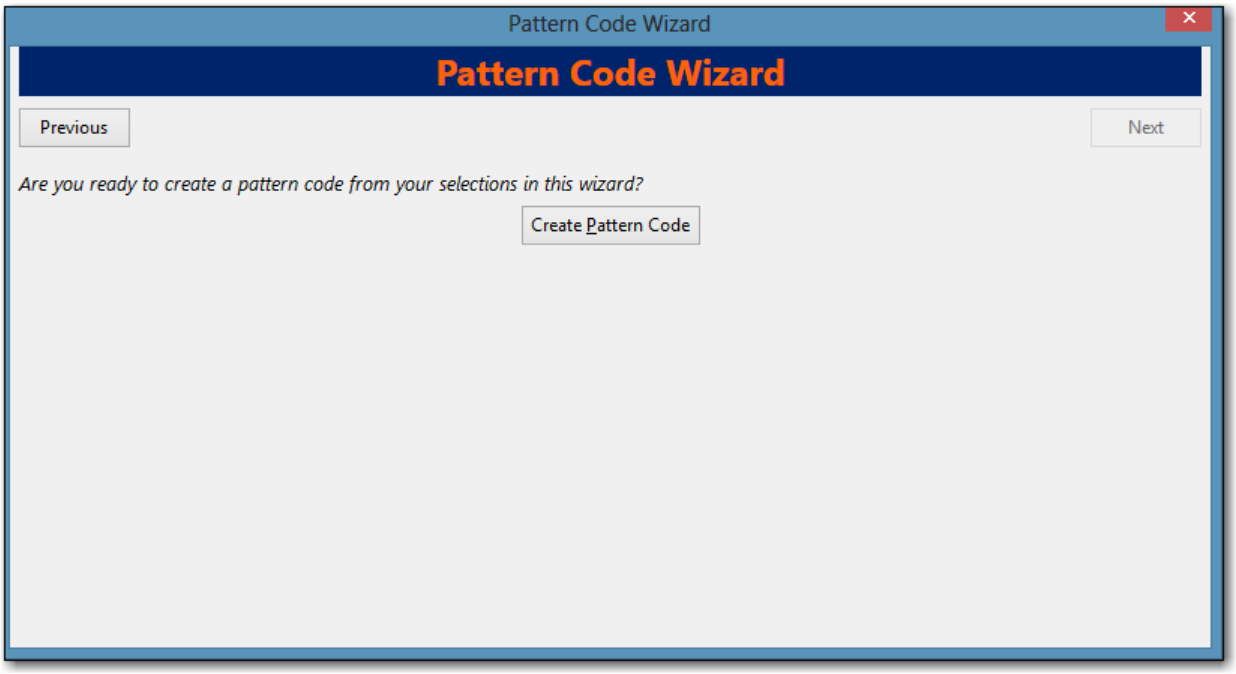


6. Regularity Information

   - If needed, check box for *Use specific regularity information.*
   - Choose the appropriate information for combined, omitted or published issues.
   - If you selected *Use number of issues per year:* in the previous step, you will need to specify when the issues are published using the specific regularity information.
   - Choose the appropriate frequency and issue. Add additional rows as required.
   - Click *Finish.*

7. Captions and Patterns

   - To complete the wizard, click *Create Pattern Code.*
   - Click *Create Caption and Pattern.*


Pattern Code Wizard
Pattern Code Wizard
Previous
Next
Are you ready to create a pattern code from your selections in this wizard?
Create Pattern Code

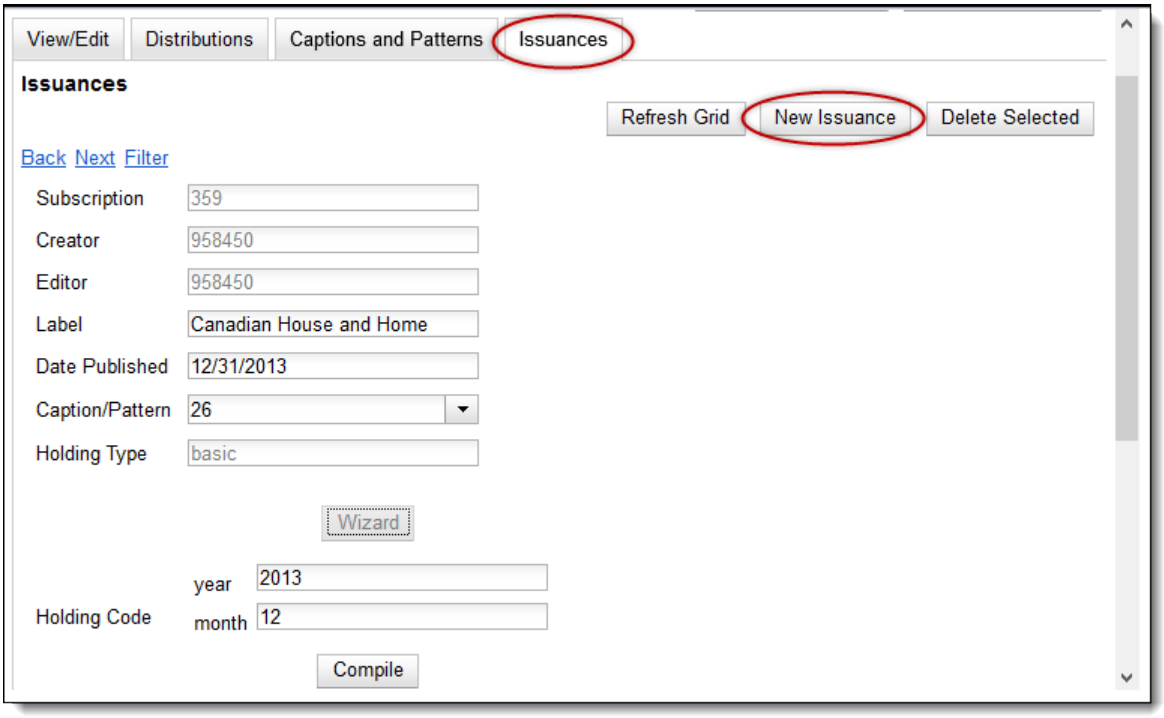
37.2.6. Create an Issuance

Issuance is a simple,uncompressed MFHD field 863.

1. The Issuances function enables you to manually create an issue. Evergreen will use the initial issue that you manually create to predict future issues. You need to create a “dummy” issuance that will be deleted after you have done your predictions. This should be created for the issue BEFORE your first issue.

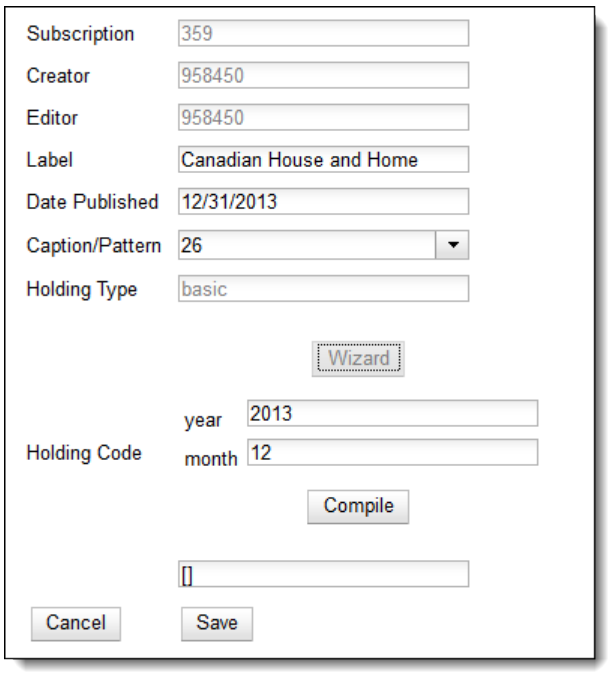
2. Click on the Issuances tab.

3. Click on *New Issuance*.



4. Complete the Issuance information

   - Label: Enter a name for this issuance.
   - Date Published: Enter the date for the issue before the first one in your subscription. For example, if your subscription starts in January 2014, enter a pub. date for the December 2013 issue.
   - Click the *Wizard* button. Enter Holding codes ii. Click on *Compile.*

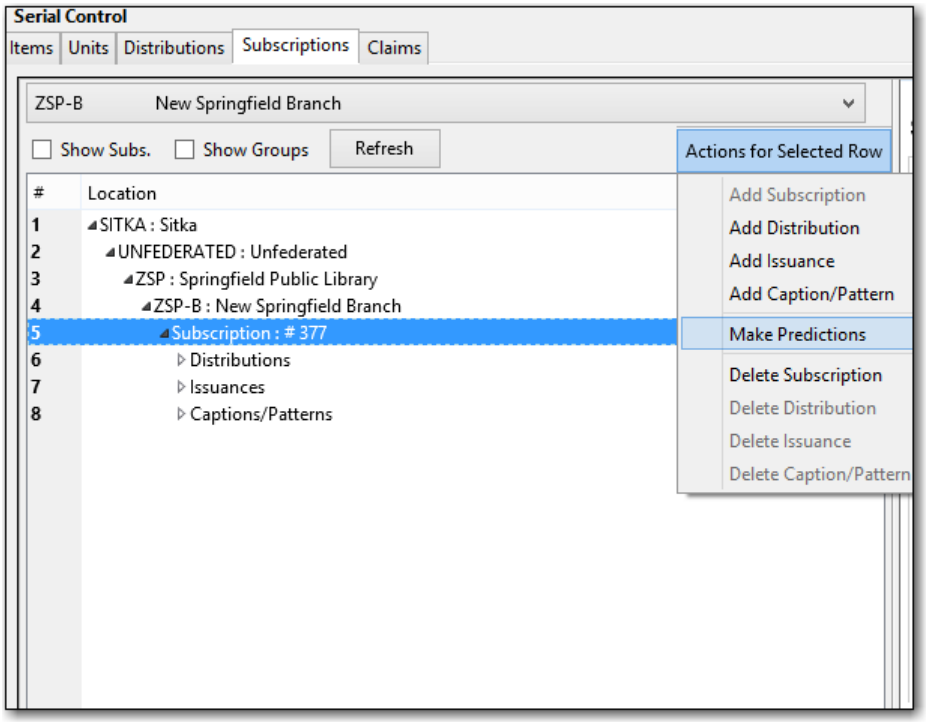


   - When finished, click *Save*.

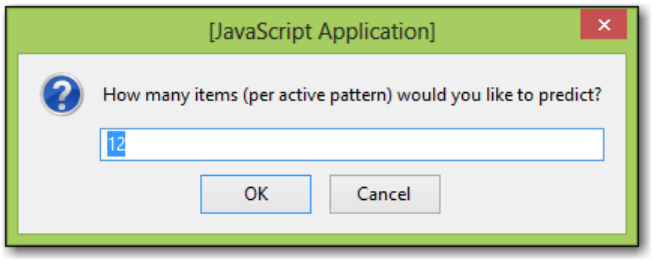
37.2.7. Generate Predictions

1. Open the *Subscriptions* tab.
2. Click on the subscription row.

3. Click *Actions for Selected Row* and select *Make Predictions.*



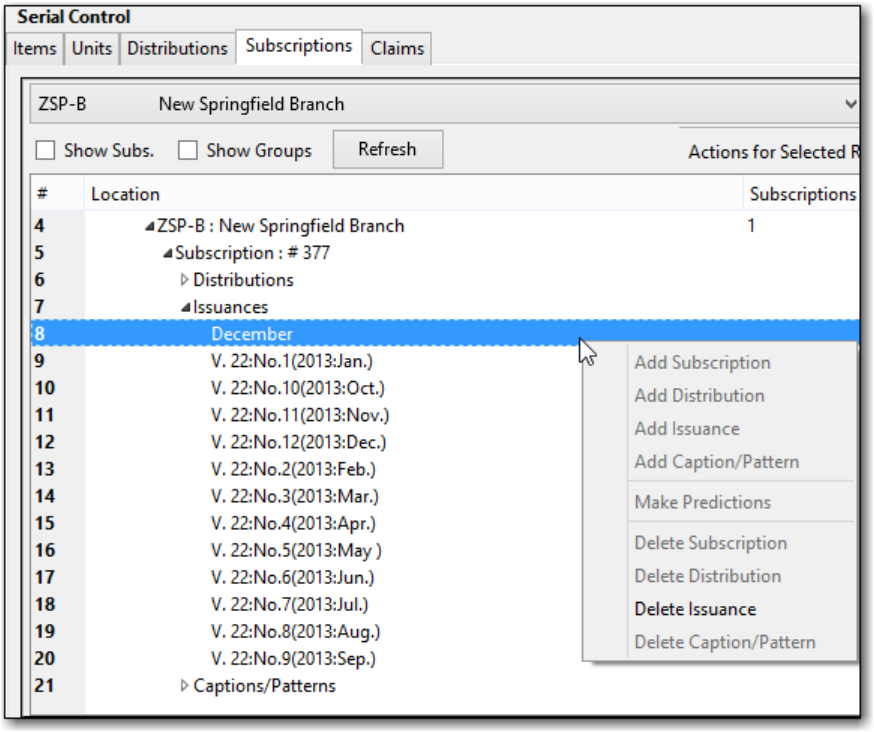
4. A pop up box will ask you how many items you want to predict. Enter the number, and click *OK.*



5. A confirmation message will appear. Click *OK.*

6. Delete first Issuance

- Click on the arrow beside the subscription
- Click on the arrow beside *Issuances.*
- Right Click on the “dummy” issuance you created and choose *Delete Issuance.*

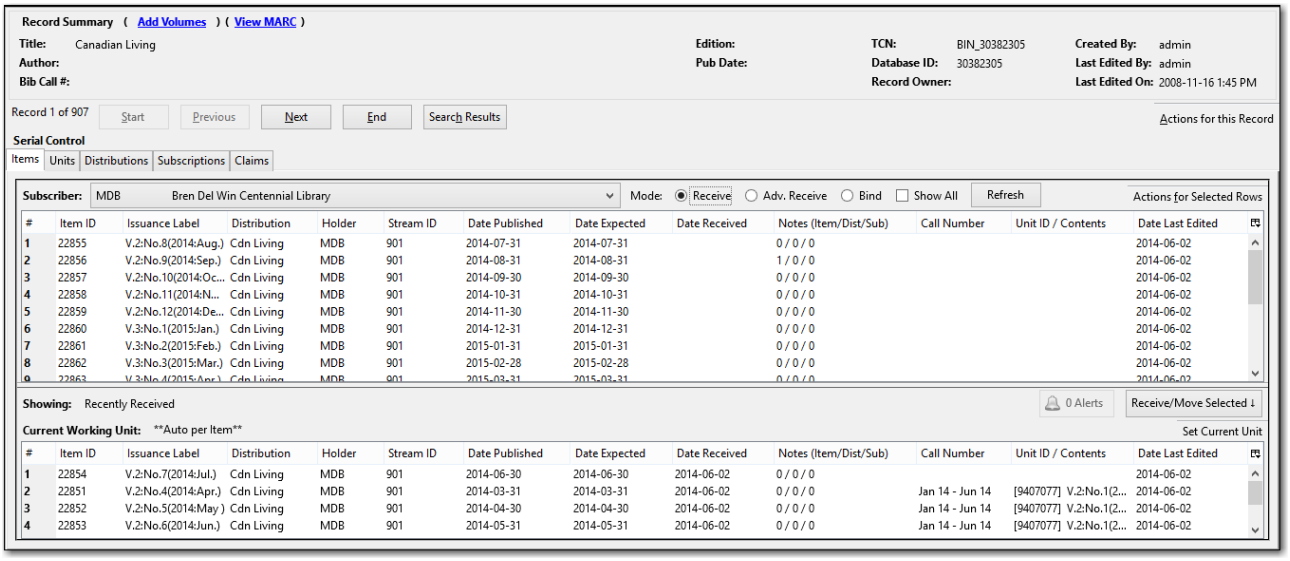


Chapter 38. Receiving Serials

38.1. Receive serials

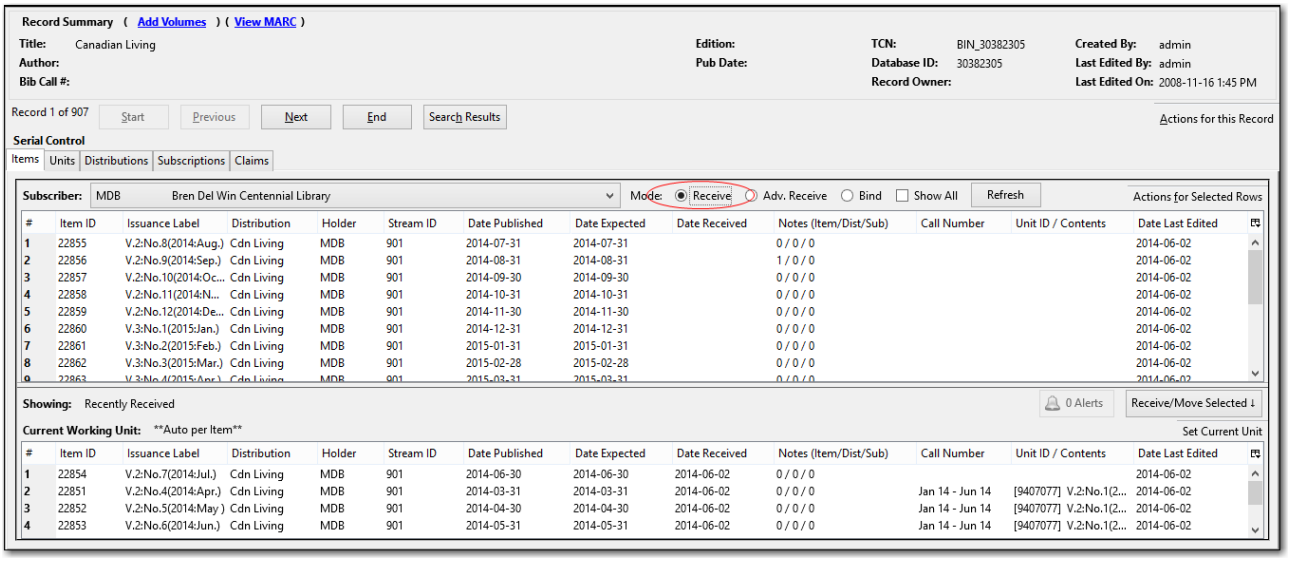
Receiving serials is done through the *Serials Control View*.

1. Go to the *Items* tab.


Record Summary (Add Volumes) (View MARC)
Title: Canadian Living
Author:
Bib Call #:
Edition:
Pub Date:
TCN: BIN_30382305
Database ID: 30382305
Record Owner:
Created By: admin
Last Edited By: admin
Last Edited On: 2008-11-16 1:45 PM
Record 1 of 907
Start
Previous
Next
End
Search Results
Actions for this Record
Serial Control
Items
Units
Distributions
Subscriptions
Claims
Subscriber: MDB Bren Del Win Centennial Library
Mode: Receive Adv. Receive Bind Show All
Refresh
Actions for Selected Rows
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Notes (Item/Dist/Sub) Call Number Unit ID / Contents Date Last Edited
1 22855 V.2:No.8(2014:Aug.) Cdn Living MDB 901 2014-07-31 2014-07-31 0 / 0 / 0 2014-06-02
2 22856 V.2:No.9(2014:Sep.) Cdn Living MDB 901 2014-08-31 2014-08-31 1 / 0 / 0 2014-06-02
3 22857 V.2:No.10(2014:Oc... Cdn Living MDB 901 2014-09-30 2014-09-30 0 / 0 / 0 2014-06-02
4 22858 V.2:No.11(2014:N... Cdn Living MDB 901 2014-10-31 2014-10-31 0 / 0 / 0 2014-06-02
5 22859 V.2:No.12(2014:De... Cdn Living MDB 901 2014-11-30 2014-11-30 0 / 0 / 0 2014-06-02
6 22860 V.3:No.1(2015:Jan.) Cdn Living MDB 901 2014-12-31 2014-12-31 0 / 0 / 0 2014-06-02
7 22861 V.3:No.2(2015:Feb.) Cdn Living MDB 901 2015-01-31 2015-01-31 0 / 0 / 0 2014-06-02
8 22862 V.3:No.3(2015:Mar.) Cdn Living MDB 901 2015-02-28 2015-02-28 0 / 0 / 0 2014-06-02
Showing: Recently Received
0 Alerts
Receive/Move Selected
Current Working Unit: **Auto per Item**
Set Current Unit
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Notes (Item/Dist/Sub) Call Number Unit ID / Contents Date Last Edited
1 22854 V.2:No.7(2014:Jul.) Cdn Living MDB 901 2014-06-30 2014-06-30 2014-06-02 0 / 0 / 0 2014-06-02
2 22851 V.2:No.4(2014:Apr.) Cdn Living MDB 901 2014-03-31 2014-03-31 2014-06-02 0 / 0 / 0 Jan 14 - Jun 14 [9407077] V.2:No.1(2... 2014-06-02
3 22852 V.2:No.5(2014:May) Cdn Living MDB 901 2014-04-30 2014-04-30 2014-06-02 0 / 0 / 0 Jan 14 - Jun 14 [9407077] V.2:No.1(2... 2014-06-02
4 22853 V.2:No.6(2014:Jun.) Cdn Living MDB 901 2014-05-31 2014-05-31 2014-06-02 0 / 0 / 0 Jan 14 - Jun 14 [9407077] V.2:No.1(2... 2014-06-02

2. Click on *Refresh*

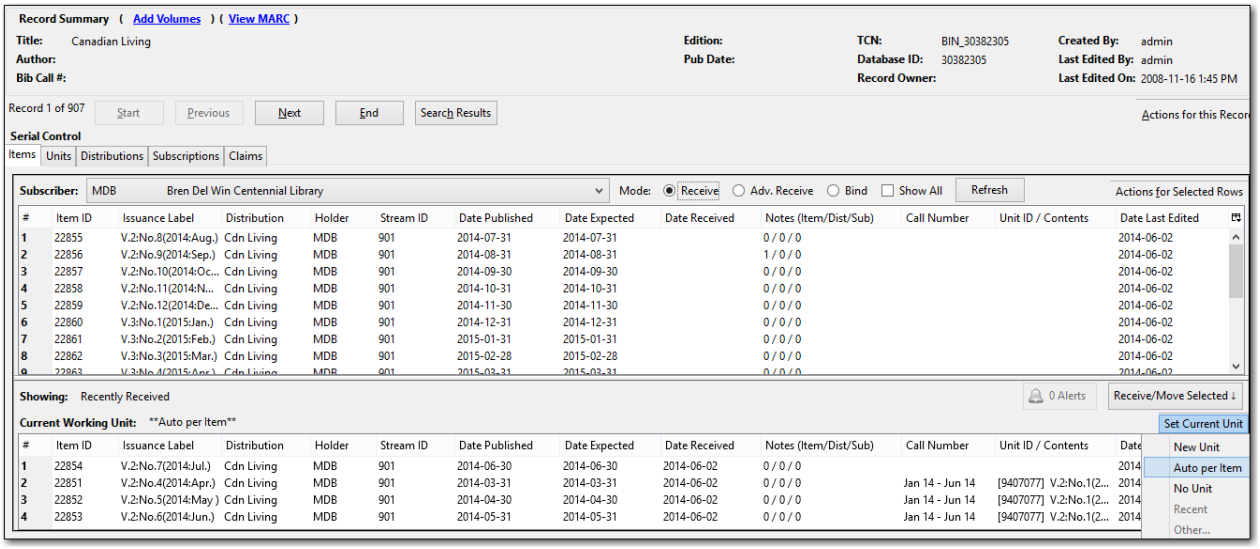
3. To receive items, click the *Receive* radio button. Items that have yet to be received are displayed in the top half of the screen the. Recently received items are displayed in the bottom half of the screen.


Record Summary (Add Volumes) (View MARC)
Title: Canadian Living
Author:
Bib Call #:
Edition:
Pub Date:
TCN: BIN_30382305
Database ID: 30382305
Record Owner:
Created By: admin
Last Edited By: admin
Last Edited On: 2008-11-16 1:45 PM
Record 1 of 907
Start
Previous
Next
End
Search Results
Actions for this Record
Serial Control
Items
Units
Distributions
Subscriptions
Claims
Subscriber: MDB Bren Del Win Centennial Library
Mode: Receive Adv. Receive Bind Show All
Refresh
Actions for Selected Rows
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Notes (Item/Dist/Sub) Call Number Unit ID / Contents Date Last Edited
1 22855 V.2:No.8(2014:Aug.) Cdn Living MDB 901 2014-07-31 2014-07-31 0 / 0 / 0 2014-06-02
2 22856 V.2:No.9(2014:Sep.) Cdn Living MDB 901 2014-08-31 2014-08-31 1 / 0 / 0 2014-06-02
3 22857 V.2:No.10(2014:Oc... Cdn Living MDB 901 2014-09-30 2014-09-30 0 / 0 / 0 2014-06-02
4 22858 V.2:No.11(2014:N... Cdn Living MDB 901 2014-10-31 2014-10-31 0 / 0 / 0 2014-06-02
5 22859 V.2:No.12(2014:De... Cdn Living MDB 901 2014-11-30 2014-11-30 0 / 0 / 0 2014-06-02
6 22860 V.3:No.1(2015:Jan.) Cdn Living MDB 901 2014-12-31 2014-12-31 0 / 0 / 0 2014-06-02
7 22861 V.3:No.2(2015:Feb.) Cdn Living MDB 901 2015-01-31 2015-01-31 0 / 0 / 0 2014-06-02
8 22862 V.3:No.3(2015:Mar.) Cdn Living MDB 901 2015-02-28 2015-02-28 0 / 0 / 0 2014-06-02
Showing: Recently Received
0 Alerts
Receive/Move Selected
Current Working Unit: **Auto per Item**
Set Current Unit
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Notes (Item/Dist/Sub) Call Number Unit ID / Contents Date Last Edited
1 22854 V.2:No.7(2014:Jul.) Cdn Living MDB 901 2014-06-30 2014-06-30 2014-06-02 0 / 0 / 0 2014-06-02
2 22851 V.2:No.4(2014:Apr.) Cdn Living MDB 901 2014-03-31 2014-03-31 2014-06-02 0 / 0 / 0 Jan 14 - Jun 14 [9407077] V.2:No.1(2... 2014-06-02
3 22852 V.2:No.5(2014:May) Cdn Living MDB 901 2014-04-30 2014-04-30 2014-06-02 0 / 0 / 0 Jan 14 - Jun 14 [9407077] V.2:No.1(2... 2014-06-02
4 22853 V.2:No.6(2014:Jun.) Cdn Living MDB 901 2014-05-31 2014-05-31 2014-06-02 0 / 0 / 0 Jan 14 - Jun 14 [9407077] V.2:No.1(2... 2014-06-02

4. Select the issue that you want to receive.

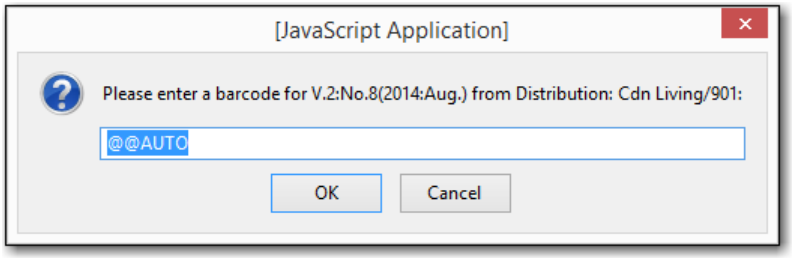
5. Select the current working unit. Click *Set Current Unit*, located in the lower right corner of the screen. A drop down menu will appear. Select *Auto per item.*

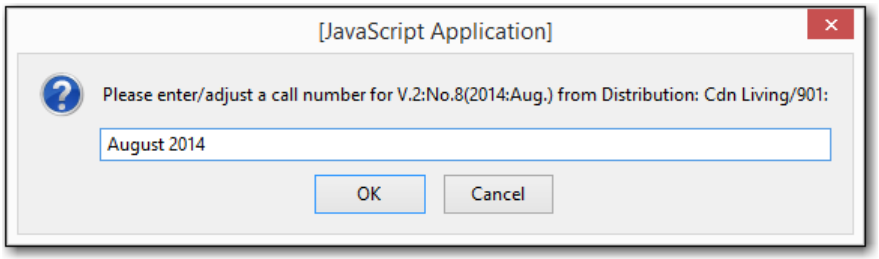
   - Auto per item - Use this if you want to assign a barcode to each item individually.
   - New Unit - Use this if you want to assign the same barcode to each item within a unit. (Binding Process)
   - No Unit - Use this if you do not want to assign a barcode to the item. Please note that this selection will not create a copy on the copy table and is not recommended.



6. Click *Receive/Move Selected.*

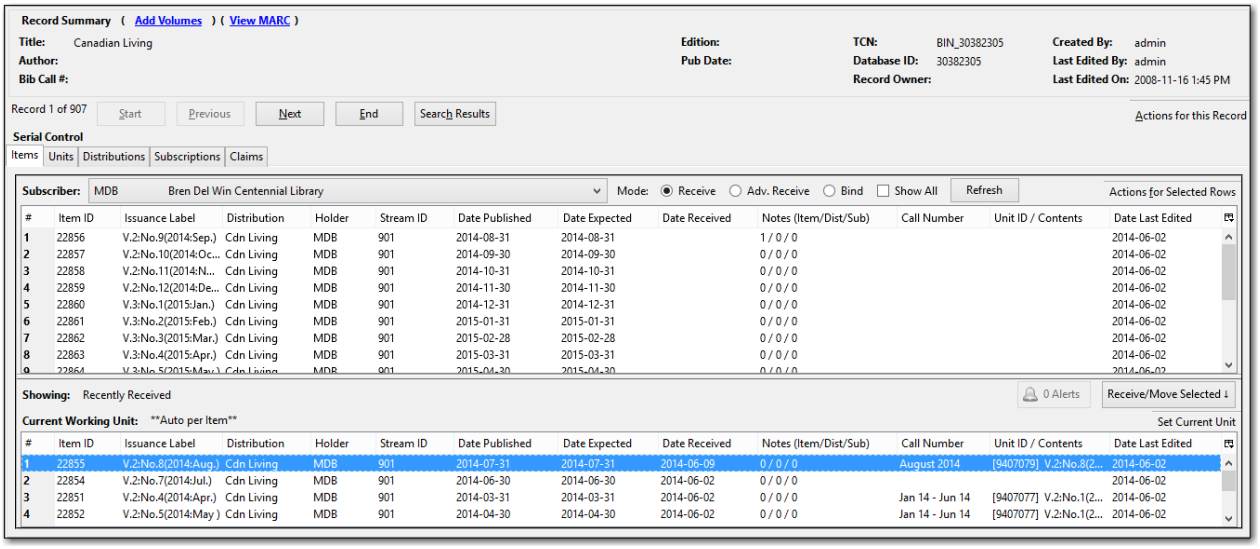
7. Enter a barcode and call number. You can scan the item barcode into the barcode field. Enter a rational call # for each item **(We recommend enumeration and/or chronology captions (ex V.22 No.1 Jan 2013 / January 2013)**



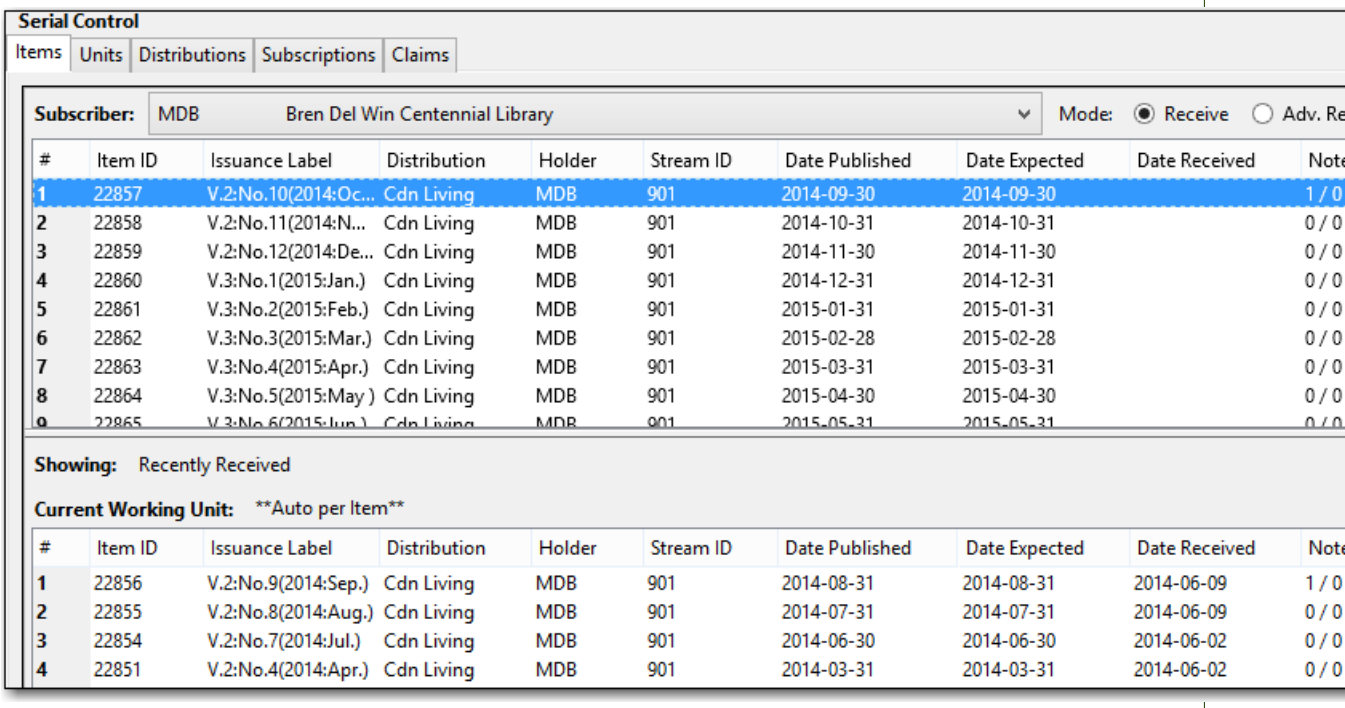


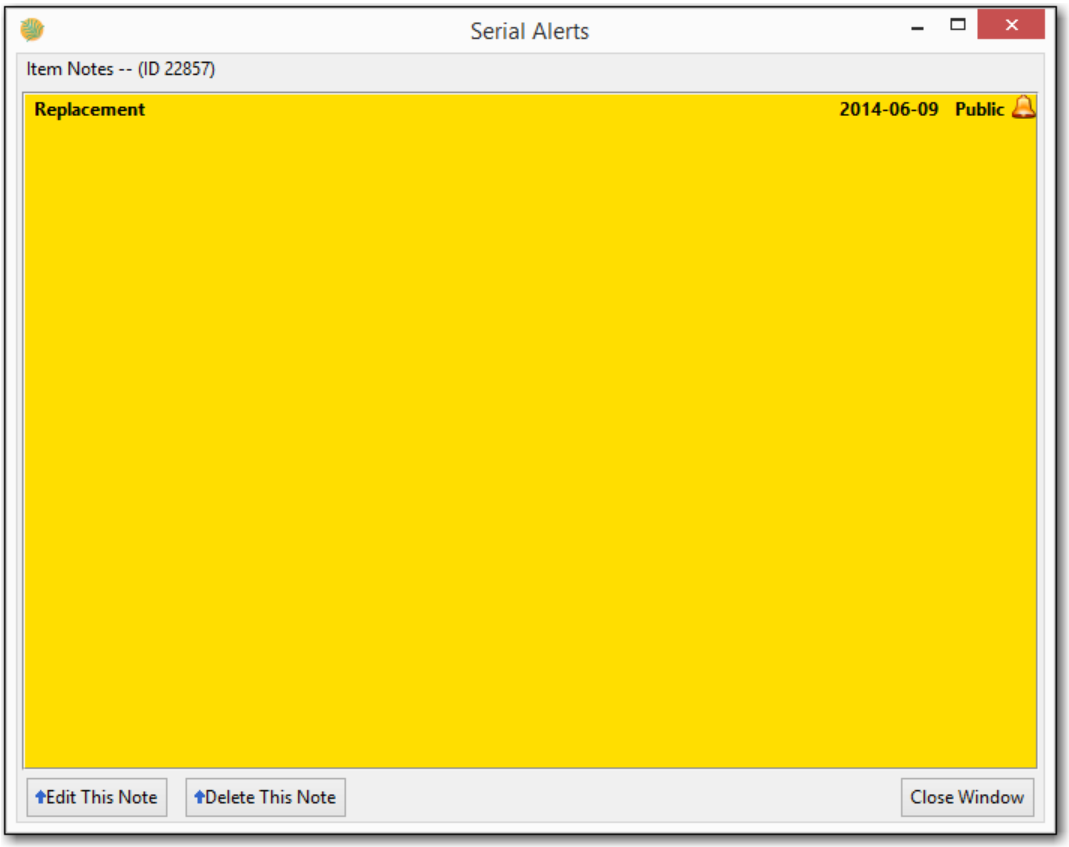
8. A message confirming receipt of the item appears. Click *OK*.

- The screen refreshes. In the top half of the screen the item displays a received date. In the bottom half of the screen the item that you have just received is now at the top of the list of the received items.


Record Summary (Add Volumes) (View MARC)
Title: Canadian Living
Author:
Bib Call #:
Edition:
Pub Date:
TCN: BIN_30382305
Database ID: 30382305
Record Owner:
Created By: admin
Last Edited By: admin
Last Edited On: 2008-11-16 1:45 PM
Record 1 of 907
Start
Previous
Next
End
Search Results
Actions for this Record
Serial Control
Items
Units
Distributions
Subscriptions
Claims
Subscriber: MDB Bren Del Win Centennial Library
Mode: Receive Adv. Receive Bind Show All
Refresh
Actions for Selected Rows
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Notes (Item/Dist/Sub) Call Number Unit ID / Contents Date Last Edited
1 22856 V.2:No.9(2014:Sep.) Cdn Living MDB 901 2014-08-31 2014-08-31 1 / 0 / 0 2014-06-02
2 22857 V.2:No.10(2014:Oc... Cdn Living MDB 901 2014-09-30 2014-09-30 0 / 0 / 0 2014-06-02
3 22858 V.2:No.11(2014:N... Cdn Living MDB 901 2014-10-31 2014-10-31 0 / 0 / 0 2014-06-02
4 22859 V.2:No.12(2014:De... Cdn Living MDB 901 2014-11-30 2014-11-30 0 / 0 / 0 2014-06-02
5 22860 V.3:No.1(2015:Jan.) Cdn Living MDB 901 2014-12-31 2014-12-31 0 / 0 / 0 2014-06-02
6 22861 V.3:No.2(2015:Feb.) Cdn Living MDB 901 2015-01-31 2015-01-31 0 / 0 / 0 2014-06-02
7 22862 V.3:No.3(2015:Mar.) Cdn Living MDB 901 2015-02-28 2015-02-28 0 / 0 / 0 2014-06-02
8 22863 V.3:No.4(2015:Apr.) Cdn Living MDB 901 2015-03-31 2015-03-31 0 / 0 / 0 2014-06-02
Showing: Recently Received
0 Alerts
Receive/Move Selected
Current Working Unit: **Auto per Item**
Set Current Unit
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Notes (Item/Dist/Sub) Call Number Unit ID / Contents Date Last Edited
1 22855 V.2:No.8(2014:Aug.) Cdn Living MDB 901 2014-07-31 2014-07-31 2014-06-09 0 / 0 / 0 August 2014 [9407079] V.2:No.8(2... 2014-06-02
2 22854 V.2:No.7(2014:Jul.) Cdn Living MDB 901 2014-06-30 2014-06-30 2014-06-02 0 / 0 / 0 2014-06-02
3 22851 V.2:No.4(2014:Apr.) Cdn Living MDB 901 2014-03-31 2014-03-31 2014-06-02 0 / 0 / 0 Jan 14 - Jun 14 [9407077] V.2:No.1(2... 2014-06-02
4 22852 V.2:No.5(2014:May) Cdn Living MDB 901 2014-04-30 2014-04-30 2014-06-02 0 / 0 / 0 Jan 14 - Jun 14 [9407077] V.2:No.1(2... 2014-06-02

Serial Alerts at Receive Time - The new "Alerts" button on the Items tab displays the number of alert notes that are available for the selected items, and clicking this button opens a window which displays all applicable alert notes, sorted by type . Notes can also be edited or deleted from this window.


Serial Control
Items
Units
Distributions
Subscriptions
Claims
Subscriber:
MDB
Bren Del Win Centennial Library
Mode:
Receive
Adv. Re
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Note
1 22857 V.2:No.10(2014:Oc... Cdn Living MDB 901 2014-09-30 2014-09-30 1 / 0
2 22858 V.2:No.11(2014:N... Cdn Living MDB 901 2014-10-31 2014-10-31 0 / 0
3 22859 V.2:No.12(2014:De... Cdn Living MDB 901 2014-11-30 2014-11-30 0 / 0
4 22860 V.3:No.1(2015:Jan.) Cdn Living MDB 901 2014-12-31 2014-12-31 0 / 0
5 22861 V.3:No.2(2015:Feb.) Cdn Living MDB 901 2015-01-31 2015-01-31 0 / 0
6 22862 V.3:No.3(2015:Mar.) Cdn Living MDB 901 2015-02-28 2015-02-28 0 / 0
7 22863 V.3:No.4(2015:Apr.) Cdn Living MDB 901 2015-03-31 2015-03-31 0 / 0
8 22864 V.3:No.5(2015:May) Cdn Living MDB 901 2015-04-30 2015-04-30 0 / 0
Showing:
Recently Received
Current Working Unit:
Auto per Item
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Note
1 22856 V.2:No.9(2014:Sep.) Cdn Living MDB 901 2014-08-31 2014-08-31 2014-06-09 1 / 0
2 22855 V.2:No.8(2014:Aug.) Cdn Living MDB 901 2014-07-31 2014-07-31 2014-06-09 0 / 0
3 22854 V.2:No.7(2014:Jul.) Cdn Living MDB 901 2014-06-30 2014-06-30 2014-06-02 0 / 0
4 22851 V.2:No.4(2014:Apr.) Cdn Living MDB 901 2014-03-31 2014-03-31 2014-06-02 0 / 0

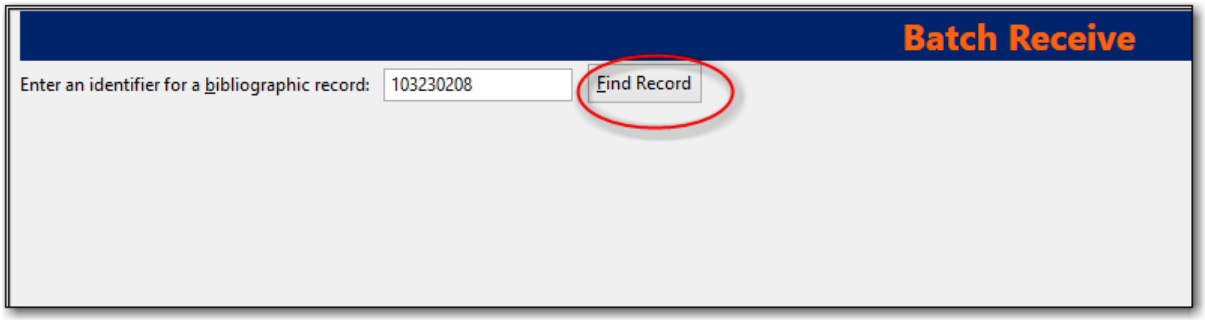


38.2. Batch Receive Serials

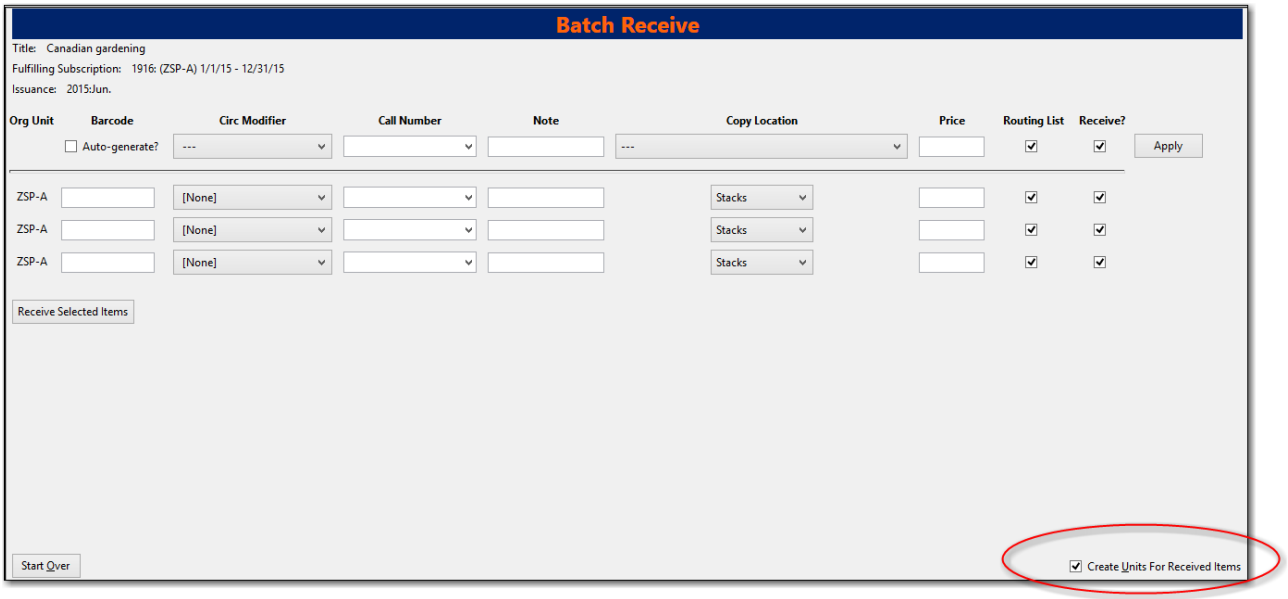
It is also possible to receiving multiple copies of a serial using the *Serials Batch Receive* interface.

This procedure is for sites receiving multiple copies of the same issue.

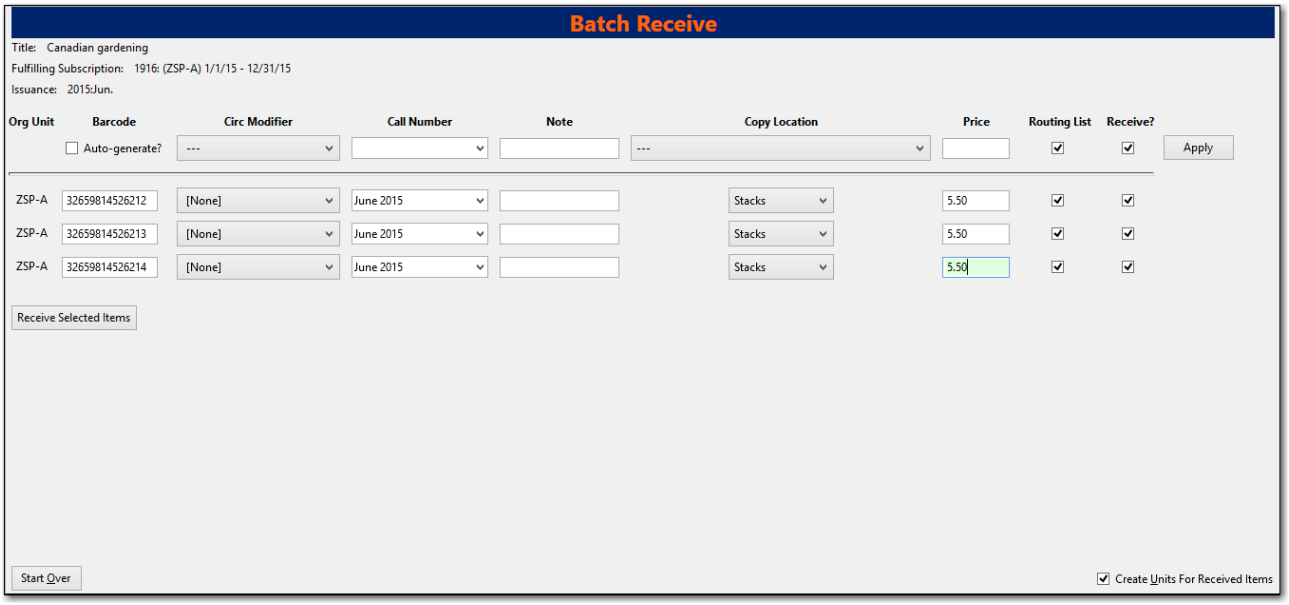
1. Click on *Actions for this record*
2. Select *Serials Batch Receive*
3. Enter an identifier for a bibliographic record. *ISSN or Database ID*
4. Click on *Find Record*



5. Choose an Issuance
6. Click *Next*
7. Select *Create Units for Receiving Items*



8. Enter *Barcode,Call Number* and *Price.*



9. Click on *Receive Selected Items.*

10. Click on *Start Over* to receive the next subscription, or close the tab.

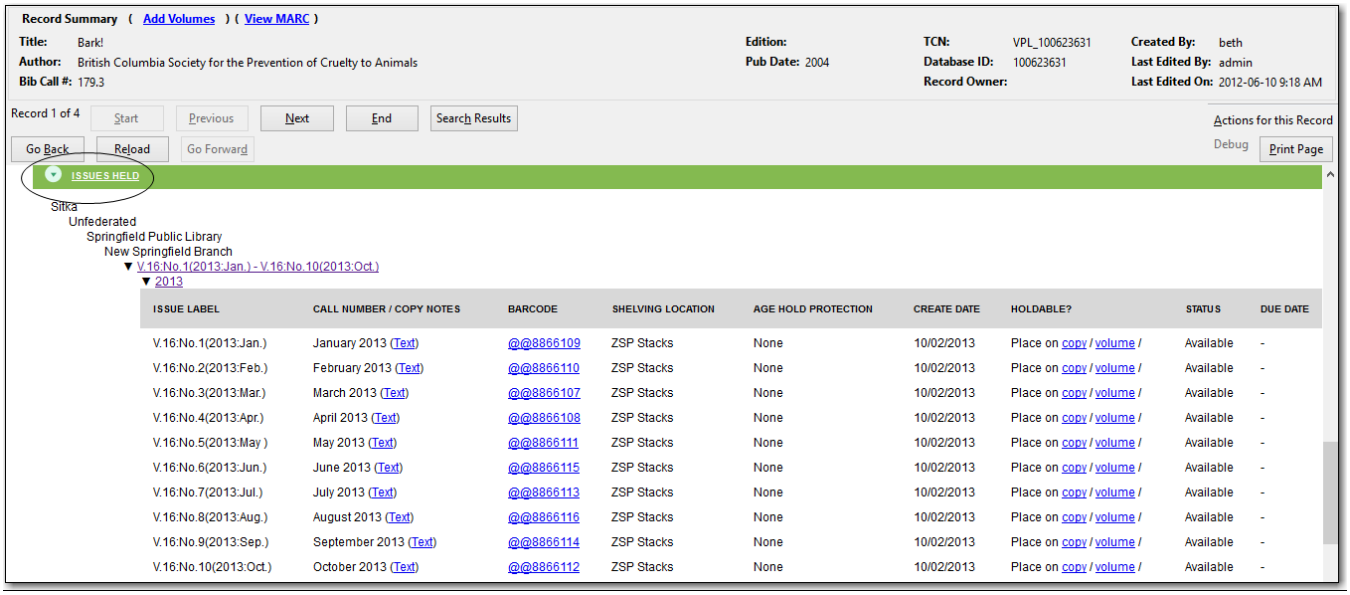
Chapter 39. OPAC

39.1. Searching for Serials in the OPAC

Searching for serials is the same process as searching for other items in the catalogue. Detailed search instructions can be found Chapter 27. Search the Catalogue

39.2. OPAC Serials Display

Bibliographic records that contain serials information will have a new section in the OPAC called *Issues Held*. The *Issues Held* tab contains an expandable holdings statement that details each issue in your collection.


Record Summary (Add Volumes) (View MARC)
Title: Bark!
Author: British Columbia Society for the Prevention of Cruelty to Animals
Bib Call #: 179.3
Edition:
Pub Date: 2004
TCN: VPL_100623631
Database ID: 100623631
Record Owner:
Created By: beth
Last Edited By: admin
Last Edited On: 2012-06-10 9:18 AM
Record 1 of 4
Start
Previous
Next
End
Search Results
Actions for this Record
Go Back
Reload
Go Forward
Debug
Print Page
ISSUES HELD
Sitka
Unfederated
Springfield Public Library
New Springfield Branch
V.16:No.1(2013:Jan.) - V.16:No.10(2013:Oct.)
2013
ISSUE LABEL | CALL NUMBER / COPY NOTES | BARCODE | SHELVING LOCATION | AGE HOLD PROTECTION | CREATE DATE | HOLDABLE? | STATUS | DUE DATE
V.16:No.1(2013:Jan.) | January 2013 (Text) | @@8866109 | ZSP Stacks | None | 10/02/2013 | Place on copy / volume / | Available | -
V.16:No.2(2013:Feb.) | February 2013 (Text) | @@8866110 | ZSP Stacks | None | 10/02/2013 | Place on copy / volume / | Available | -
V.16:No.3(2013:Mar.) | March 2013 (Text) | @@8866107 | ZSP Stacks | None | 10/02/2013 | Place on copy / volume / | Available | -
V.16:No.4(2013:Apr.) | April 2013 (Text) | @@8866108 | ZSP Stacks | None | 10/02/2013 | Place on copy / volume / | Available | -
V.16:No.5(2013:May) | May 2013 (Text) | @@8866111 | ZSP Stacks | None | 10/02/2013 | Place on copy / volume / | Available | -
V.16:No.6(2013:Jun.) | June 2013 (Text) | @@8866115 | ZSP Stacks | None | 10/02/2013 | Place on copy / volume / | Available | -
V.16:No.7(2013:Jul.) | July 2013 (Text) | @@8866113 | ZSP Stacks | None | 10/02/2013 | Place on copy / volume / | Available | -
V.16:No.8(2013:Aug.) | August 2013 (Text) | @@8866116 | ZSP Stacks | None | 10/02/2013 | Place on copy / volume / | Available | -
V.16:No.9(2013:Sep.) | September 2013 (Text) | @@8866114 | ZSP Stacks | None | 10/02/2013 | Place on copy / volume / | Available | -
V.16:No.10(2013:Oct.) | October 2013 (Text) | @@8866112 | ZSP Stacks | None | 10/02/2013 | Place on copy / volume / | Available | -

There are 3 settings in the Library Settings Editor that must be configured for your serials OPAC to display in this manner. For more information please refer to Section 35.2, “Administration”

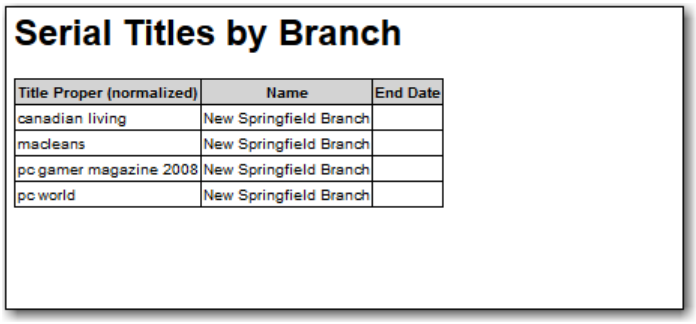
Chapter 40. Reports

40.1. Serials Report Templates

An account with Reporter permissions is required to clone templates from the *Shared Folders* section and save them to *My Folders.*

For more information regarding reports and creating reports from templates please see Part V. Reports

1. **Subscription Titles by holding library for selected year:** provides a list of all current subscriptions, used for reviewing subscriptions.



Serial Titles by Branch

Title Proper (normalized)	Name	End Date
canadian living	New Springfield Branch	
macleans	New Springfield Branch	
pc gamer magazine 2008	New Springfield Branch	
pc world	New Springfield Branch	

2. **Subscription Titles with End Date within Time Frame:** provides a list of subscriptions with an end date, used to generate titles for renewal

You must enter an end date in your subscriptions for this report to generate titles

3. **Serial Circulation Report:** provides circulation statistics for serials, used to generate circulation statistics for Serials.

4. **Serials Claiming Items List:** provides a list of serials that have not yet been received, used for claiming missing issues.

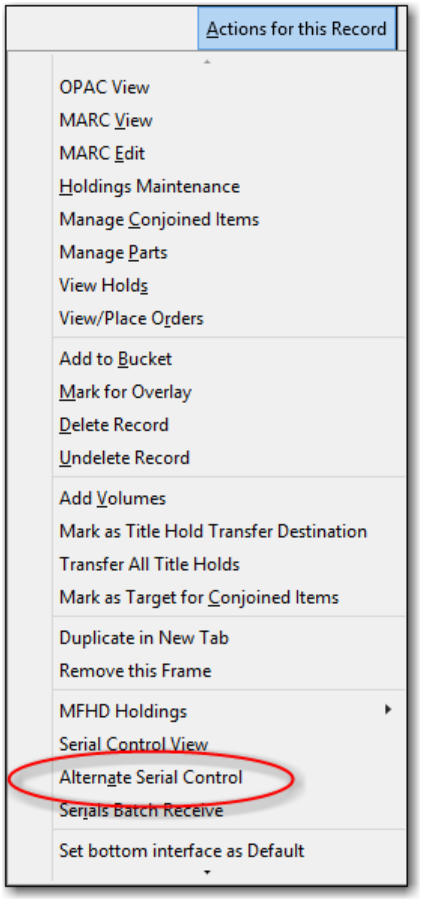
Chapter 41. Special Issues

41.1. Add an Issuance

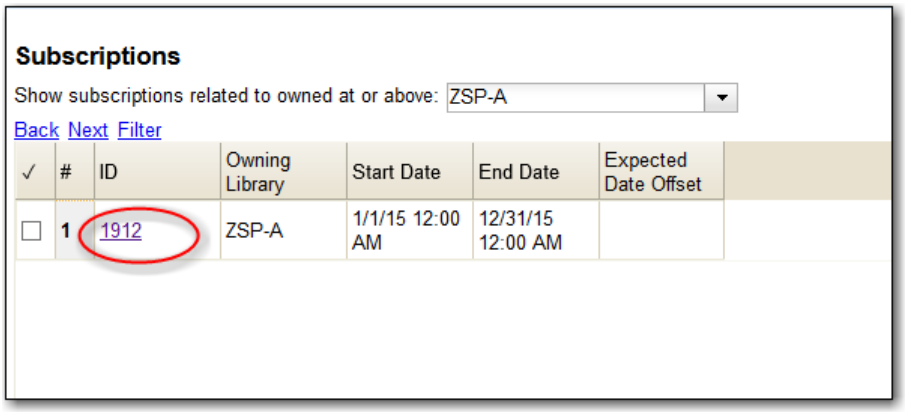
The following instructions are for adding additional Issuances to an existing subscription. This process is used for unpredicted or special Issues.

1. From the Serial Record --> Click on the *Actions for this record* button

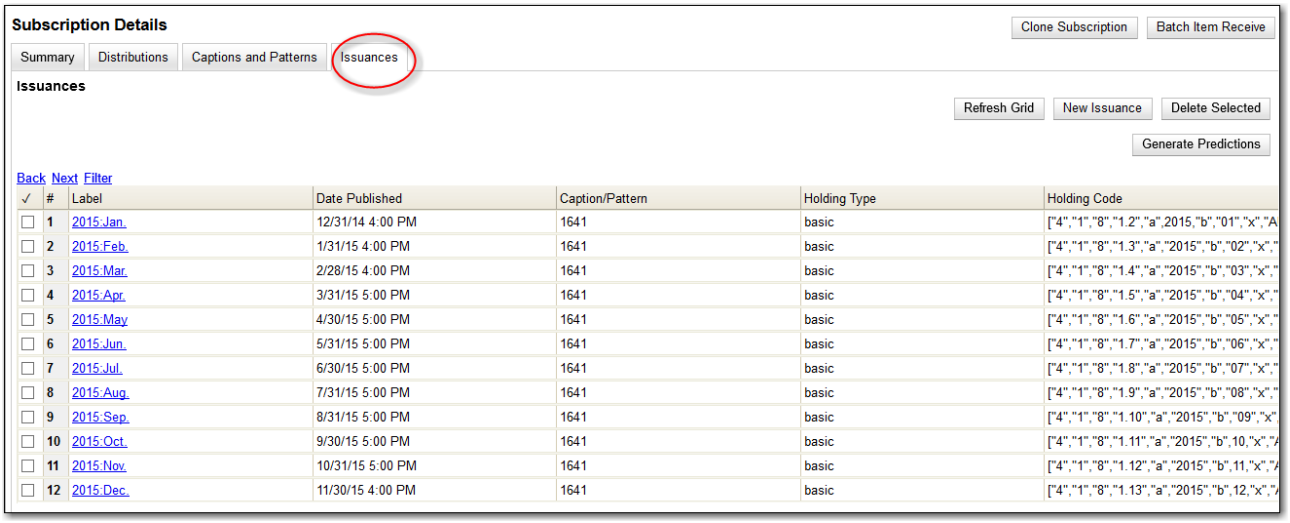
2. Select *Alternate Serial Control*



3. Click on the subscription *ID*

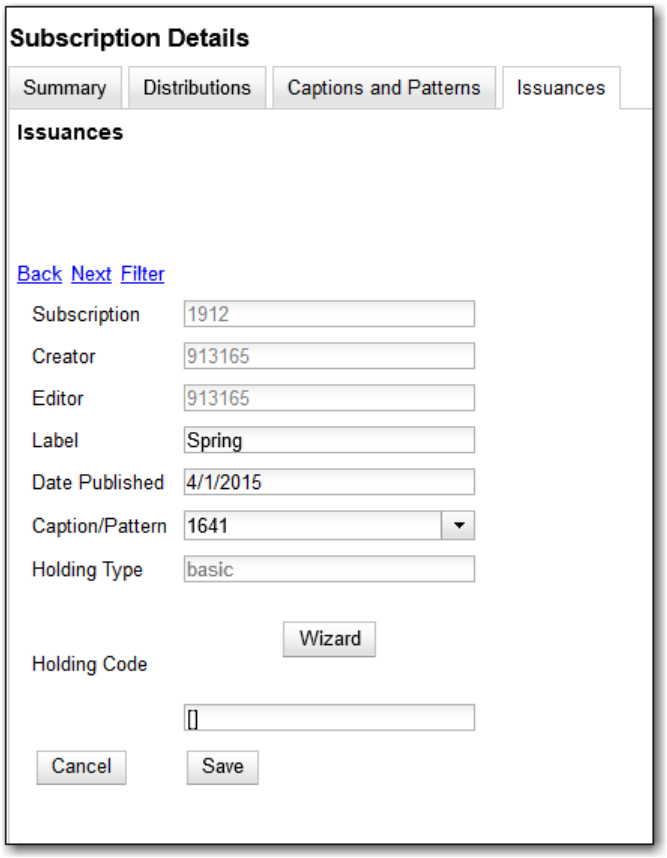

Subscriptions
Show subscriptions related to owned at or above: ZSP-A
Back Next Filter
✓ # ID Owning Library Start Date End Date Expected Date Offset
1 1912 ZSP-A 1/1/15 12:00 AM 12/31/15 12:00 AM

4. Open on the *Issuances* tab

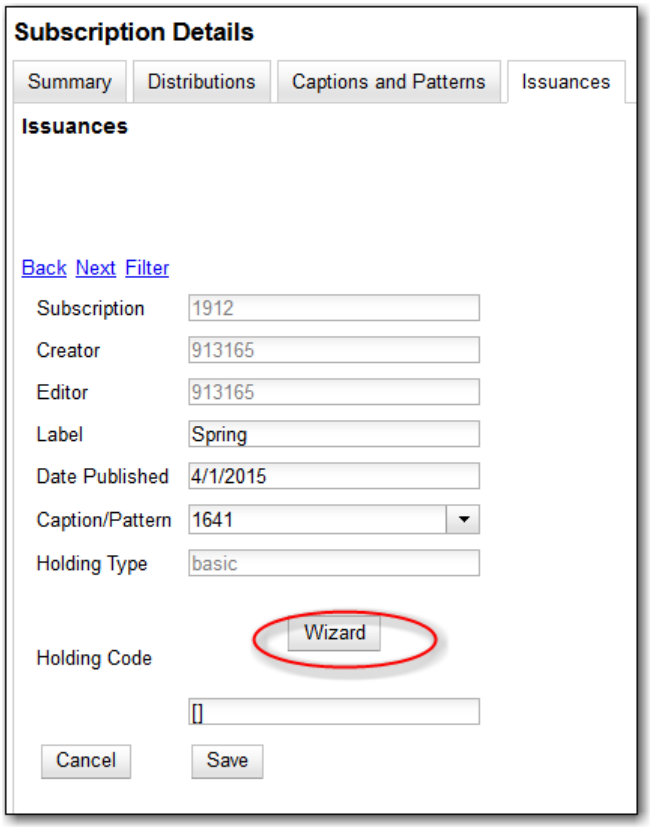

Subscription Details
Clone Subscription
Batch Item Receive
Summary
Distributions
Captions and Patterns
Issuances
Issuances
Refresh Grid
New Issuance
Delete Selected
Generate Predictions
Back Next Filter
✓ # Label Date Published Caption/Pattern Holding Type Holding Code
1 2015:Jan. 12/31/14 4:00 PM 1641 basic
2 2015:Feb. 1/31/15 4:00 PM 1641 basic
3 2015:Mar. 2/28/15 4:00 PM 1641 basic
4 2015:Apr. 3/31/15 5:00 PM 1641 basic
5 2015:May 4/30/15 5:00 PM 1641 basic
6 2015:Jun. 5/31/15 5:00 PM 1641 basic
7 2015:Jul. 6/30/15 5:00 PM 1641 basic
8 2015:Aug. 7/31/15 5:00 PM 1641 basic
9 2015:Sep. 8/31/15 5:00 PM 1641 basic
10 2015:Oct. 9/30/15 5:00 PM 1641 basic
11 2015:Nov. 10/31/15 5:00 PM 1641 basic
12 2015:Dec. 11/30/15 4:00 PM 1641 basic

5. Click on the *New Issuance* button

6. Enter the *Label* and *Date Published*

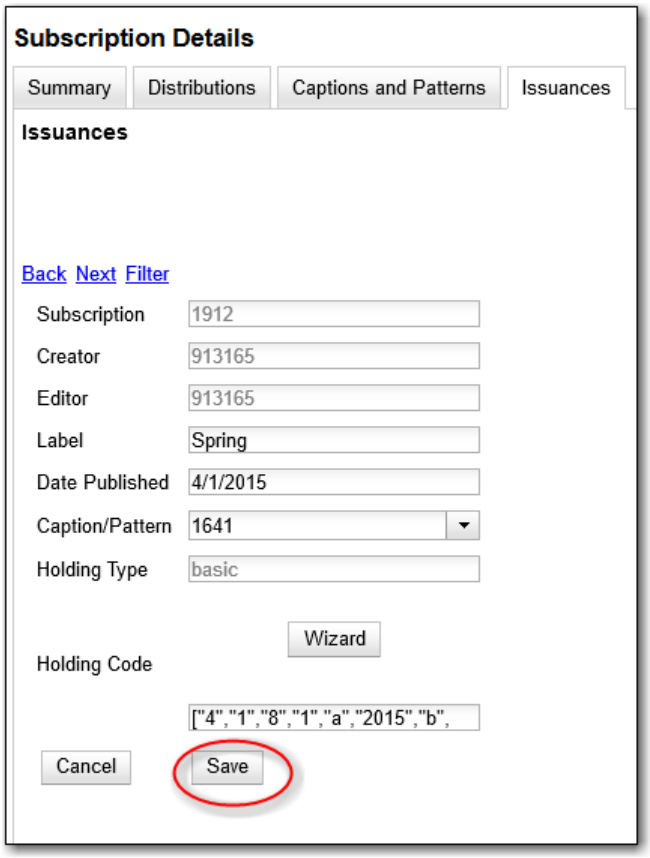


7. Click on the *Wizard* button



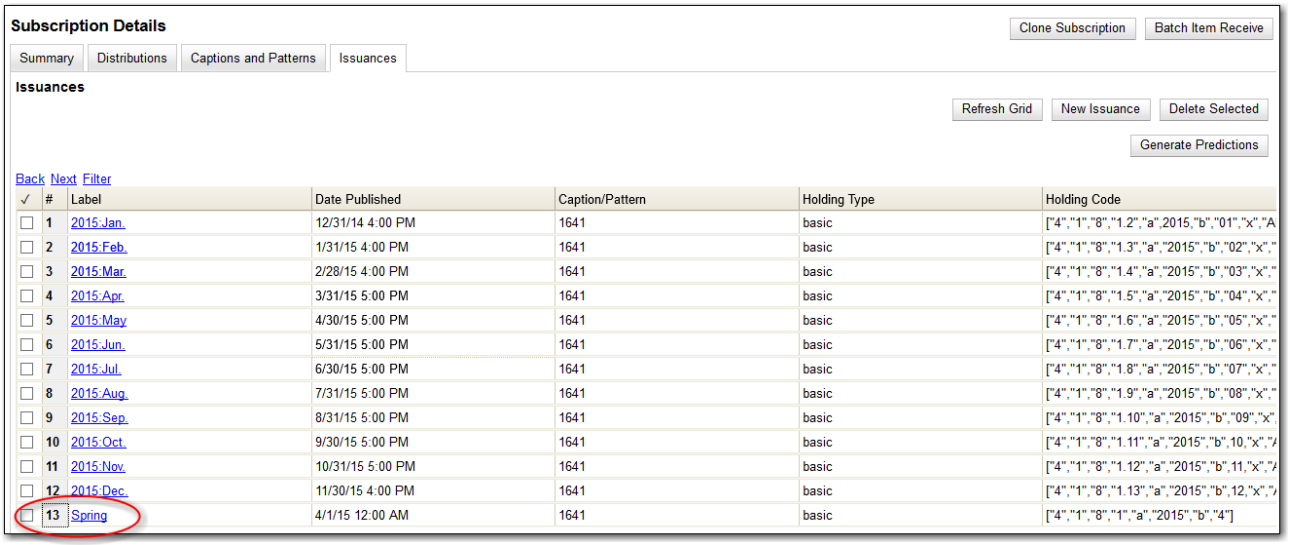
8. Click on the *Create Holding Code* button

9. Click on the *Save* button

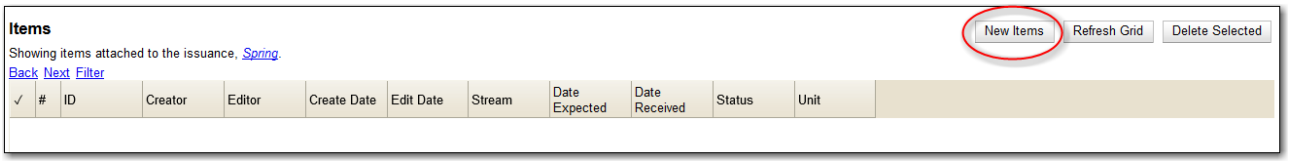


10. You must now add an item to the Issuance

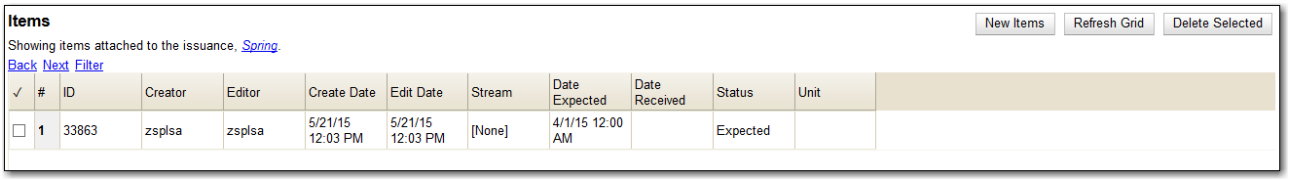
11. Click on the *Issuance* you just created


Subscription Details
Clone Subscription
Batch Item Receive
Summary
Distributions
Captions and Patterns
Issuances
Issuances
Refresh Grid
New Issuance
Delete Selected
Generate Predictions
Back Next Filter
✓ # Label Date Published Caption/Pattern Holding Type Holding Code
1 2015:Jan. 12/31/14 4:00 PM 1641 basic ["4","1","8","1.2","a",2015,"b","01","x","A
2 2015:Feb. 1/31/15 4:00 PM 1641 basic ["4","1","8","1.3","a","2015","b","02","x","
3 2015:Mar. 2/28/15 4:00 PM 1641 basic ["4","1","8","1.4","a","2015","b","03","x","
4 2015:Apr. 3/31/15 5:00 PM 1641 basic ["4","1","8","1.5","a","2015","b","04","x","
5 2015:May 4/30/15 5:00 PM 1641 basic ["4","1","8","1.6","a","2015","b","05","x","
6 2015:Jun. 5/31/15 5:00 PM 1641 basic ["4","1","8","1.7","a","2015","b","06","x","
7 2015:Jul. 6/30/15 5:00 PM 1641 basic ["4","1","8","1.8","a","2015","b","07","x","
8 2015:Aug. 7/31/15 5:00 PM 1641 basic ["4","1","8","1.9","a","2015","b","08","x","
9 2015:Sep. 8/31/15 5:00 PM 1641 basic ["4","1","8","1.10","a","2015","b","09","x"
10 2015:Oct. 9/30/15 5:00 PM 1641 basic ["4","1","8","1.11","a","2015","b",10,"x","
11 2015:Nov. 10/31/15 5:00 PM 1641 basic ["4","1","8","1.12","a","2015","b",11,"x","
12 2015:Dec. 11/30/15 4:00 PM 1641 basic ["4","1","8","1.13","a","2015","b",12,"x","
13 Spring 4/1/15 12:00 AM 1641 basic ["4","1","8","1","a","2015","b","4"]

12. Click on the *New Items* button


Items
Showing items attached to the issuance, Spring.
Back Next Filter
New Items
Refresh Grid
Delete Selected
✓ # ID Creator Editor Create Date Edit Date Stream Date Expected Date Received Status Unit

13. Enter *Date Expected* and click *Create*


Items
Showing items attached to the issuance, Spring.
Back Next Filter
New Items
Refresh Grid
Delete Selected
✓ # ID Creator Editor Create Date Edit Date Stream Date Expected Date Received Status Unit
1 33863 zsplsa zsplsa 5/21/15 12:03 PM 5/21/15 12:03 PM [None] 4/1/15 12:00 AM Expected

14. The item is now ready to receive. If you complete the Date Received field and change the status to received then it will receive the issue but it won't create the associated copy record whereas if you leave it blank and receive the item through the Serials Control View or Batch Receive function you can create the Copy Record at that time.

41.2. Edit an Issuance

The following instructions are for entering "Special Issues" or for editing an existing Issuance

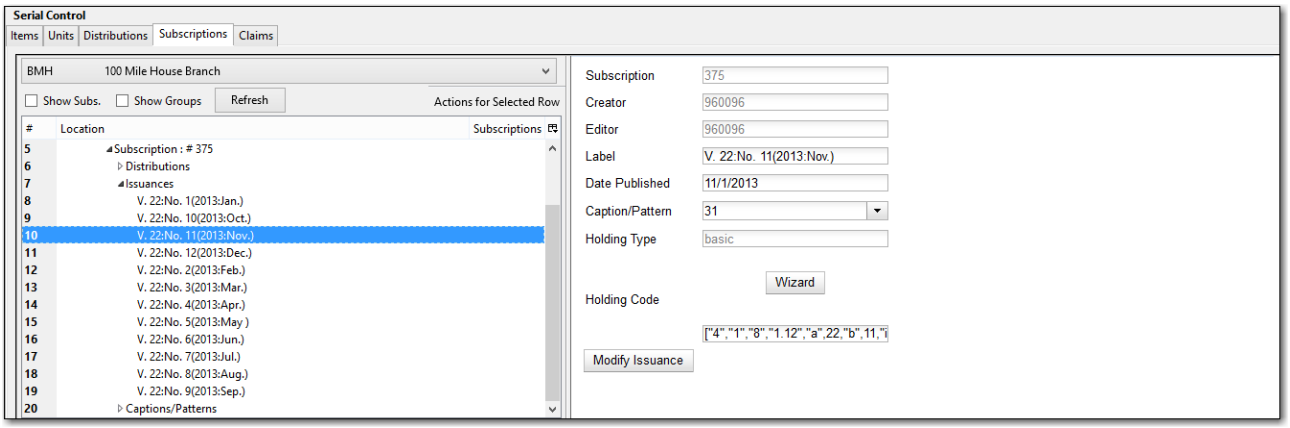
1. From the Serial Control View --> Click on the *Subscriptions* tab

2. Click on the arrow beside your library name

3. Click on the arrow beside Issuances

4. Click on the Issuance you would like to edit

5. Edit the label / date published



6. Click *Modify Issuance*

41.3. Delete an Issuance

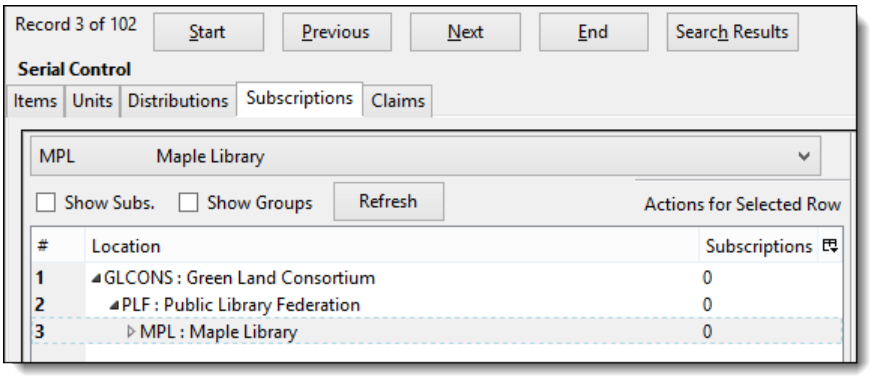
1. From the Subscriptions tab in Serials Control View
2. Click on the arrow beside your library name
3. Click on the arrow beside your subscription #
4. Click on the arrow beside Issuances
5. Right Click on the Issue you would like to delete, Select *Delete Issuance*

Chapter 42. Binding Process

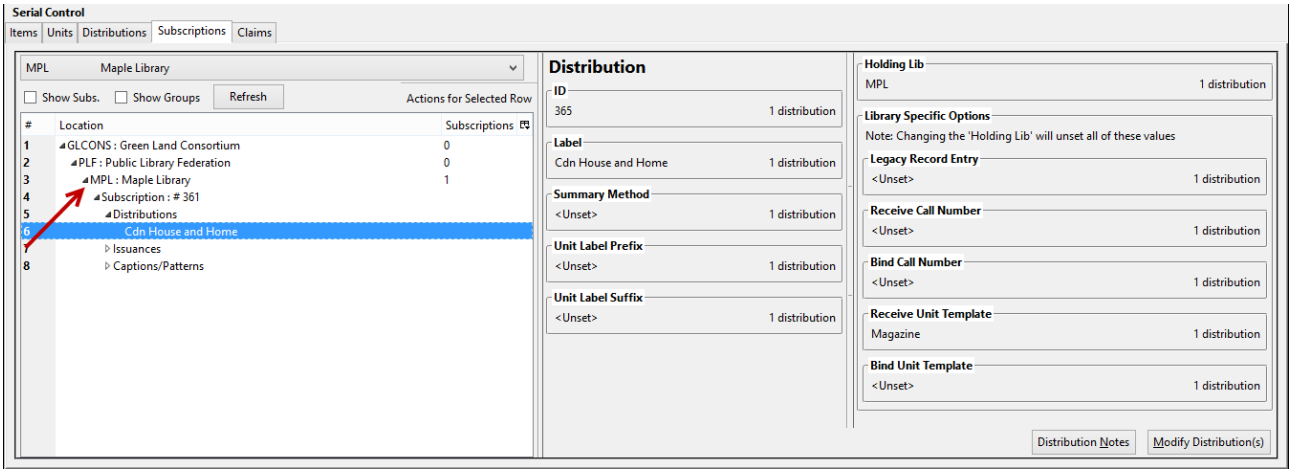
42.1. Binding Template

In order to "Bind" serials you must assign a **Bind Unit Template**. You can use the same template as your **Receive Unit Template** or create a new one. For more information about Copy Templates please see 35.1 Create a Copy Template

1. Search the catalogue. **(F3)**
2. Select the bibliographic record for the magazine or periodical.
3. Click on the title to open the *Record Details* screen.
4. Click on *Actions for this Record* and select *Serial Control View*.
5. Click on the *Subscriptions* tab.

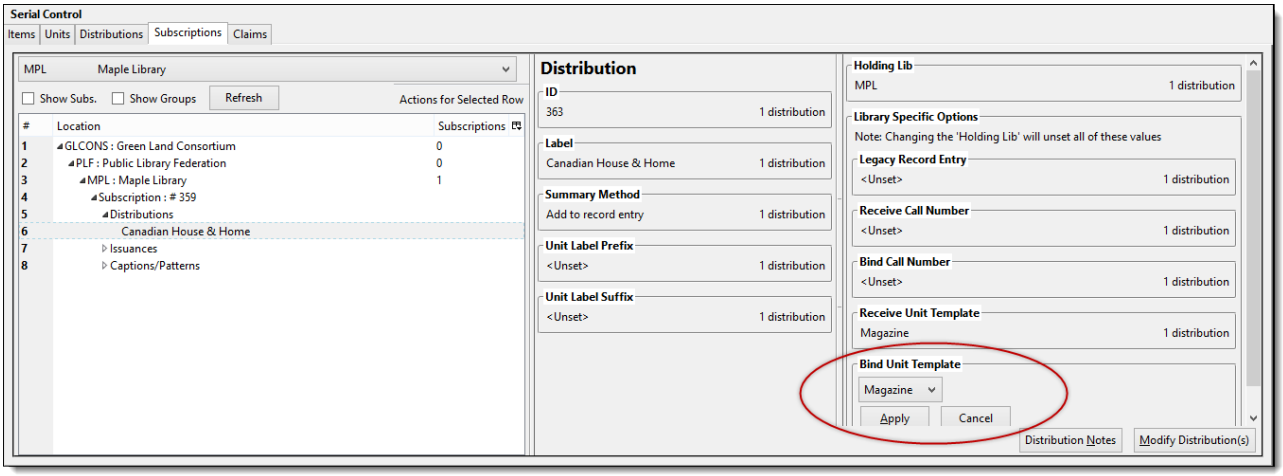


6. Click on the arrow beside your Library
7. Click on the arrow beside your Subscription
8. Click on the arrow beside your Distribution



9. Click on the Distribution Label

10. In the Distribution window on the right hand side of the screen, Click on *Bind Unit Template*.Select your template from the list



11. Click *Apply*

12. Click *Modify Distribution(s)*

13. Click *Ok*

42.2. Binding Units

1. Search the catalogue. **(F3)**

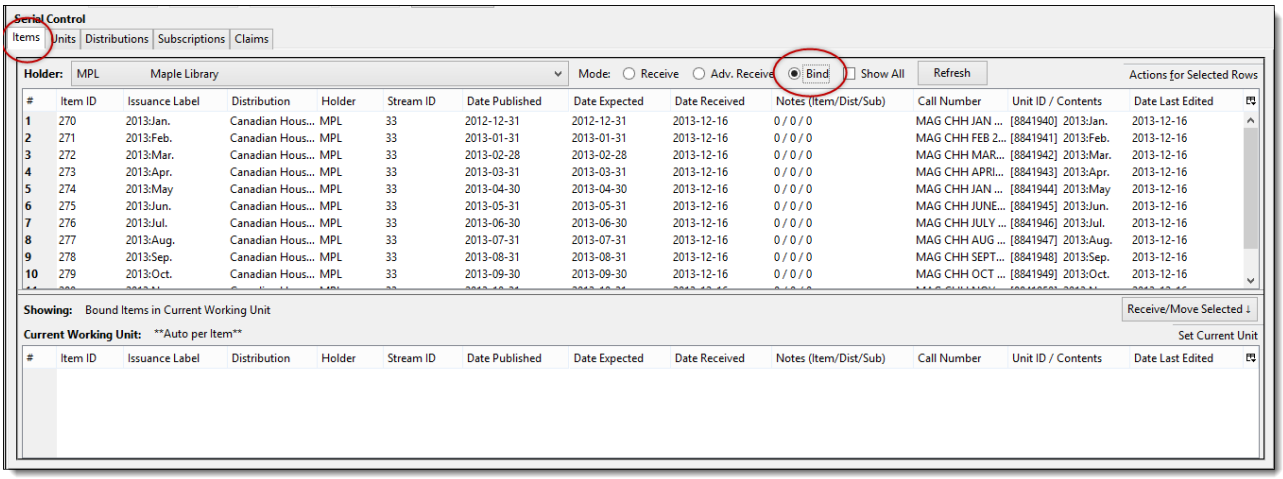
2. Select the bibliographic record for the magazine or periodical.

3. Click on the title to open the *Record Details* screen.

4. Click on *Actions for this Record* and select *Serial Control View*.

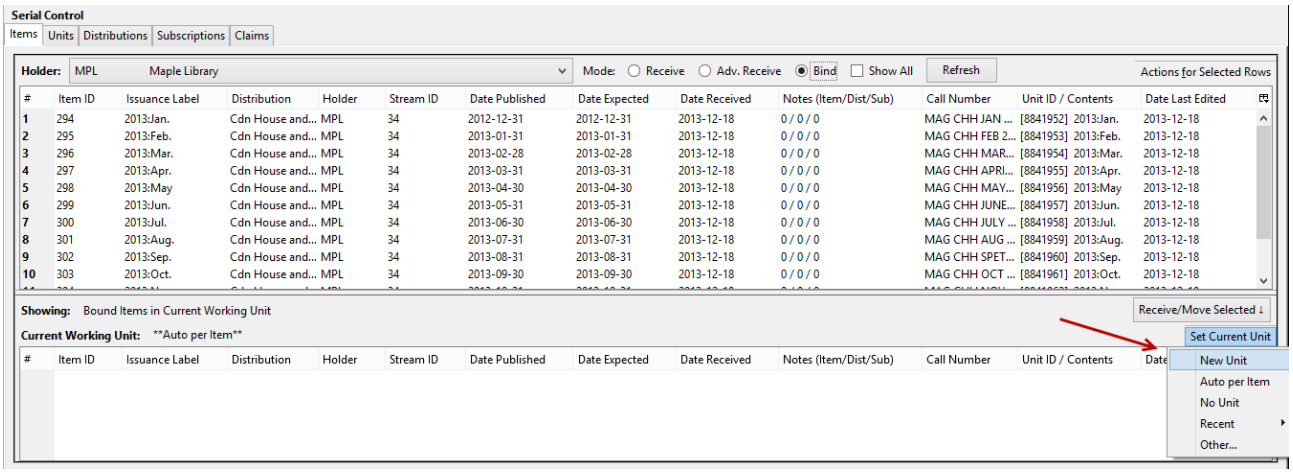
5. Click on the *Items*tab.

6. Click in the radial button for *Bind*


Serial Control
Items
Units
Distributions
Subscriptions
Claims
Holder: MPL Maple Library
Mode: Receive Adv. Receive Bind Show All
Refresh
Actions for Selected Rows
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Notes (Item/Dist/Sub) Call Number Unit ID / Contents Date Last Edited
1 270 2013:Jan. Canadian Hous... MPL 33 2012-12-31 2012-12-31 2013-12-16 0 / 0 / 0 MAG CHH JAN ... [8841940] 2013:Jan. 2013-12-16
2 271 2013:Feb. Canadian Hous... MPL 33 2013-01-31 2013-01-31 2013-12-16 0 / 0 / 0 MAG CHH FEB 2... [8841941] 2013:Feb. 2013-12-16
3 272 2013:Mar. Canadian Hous... MPL 33 2013-02-28 2013-02-28 2013-12-16 0 / 0 / 0 MAG CHH MAR... [8841942] 2013:Mar. 2013-12-16
4 273 2013:Apr. Canadian Hous... MPL 33 2013-03-31 2013-03-31 2013-12-16 0 / 0 / 0 MAG CHH APRI... [8841943] 2013:Apr. 2013-12-16
5 274 2013:May Canadian Hous... MPL 33 2013-04-30 2013-04-30 2013-12-16 0 / 0 / 0 MAG CHH JAN ... [8841944] 2013:May 2013-12-16
6 275 2013:Jun. Canadian Hous... MPL 33 2013-05-31 2013-05-31 2013-12-16 0 / 0 / 0 MAG CHH JUNE... [8841945] 2013:Jun. 2013-12-16
7 276 2013:Jul. Canadian Hous... MPL 33 2013-06-30 2013-06-30 2013-12-16 0 / 0 / 0 MAG CHH JULY ... [8841946] 2013:Jul. 2013-12-16
8 277 2013:Aug. Canadian Hous... MPL 33 2013-07-31 2013-07-31 2013-12-16 0 / 0 / 0 MAG CHH AUG ... [8841947] 2013:Aug. 2013-12-16
9 278 2013:Sep. Canadian Hous... MPL 33 2013-08-31 2013-08-31 2013-12-16 0 / 0 / 0 MAG CHH SEPT... [8841948] 2013:Sep. 2013-12-16
10 279 2013:Oct. Canadian Hous... MPL 33 2013-09-30 2013-09-30 2013-12-16 0 / 0 / 0 MAG CHH OCT ... [8841949] 2013:Oct. 2013-12-16
Showing: Bound Items in Current Working Unit
Receive/Move Selected
Current Working Unit: **Auto per Item**
Set Current Unit
Item ID Issuance Label Distribution Holder Stream ID Date Published Date Expected Date Received Notes (Item/Dist/Sub) Call Number Unit ID / Contents Date Last Edited

7. Click on *Set Current Unit*

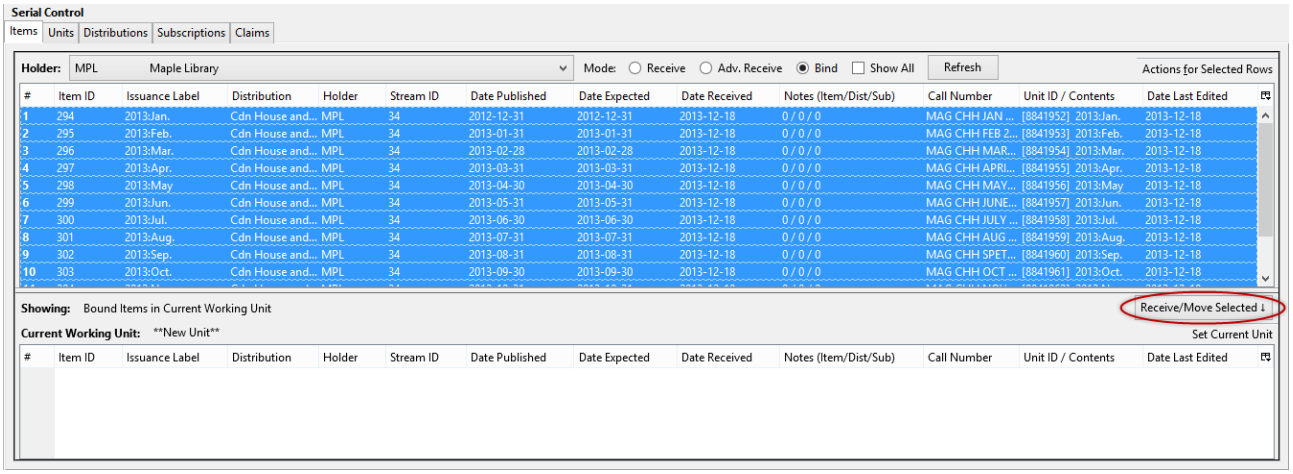
8. Select *New Unit* This is will allow you to use 1 barcode for all items within the unit



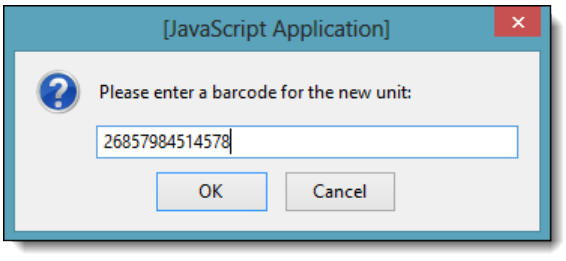
If you want the item to be bound into an existing unit, select *Recent* and select the desired unit from the menu. To make a change in bound items, receive or bind the items into an already existing unit

9. Select the items to be bound

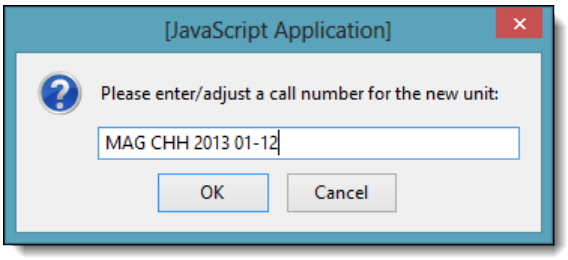
10. Click on *Receive/Move Selected*



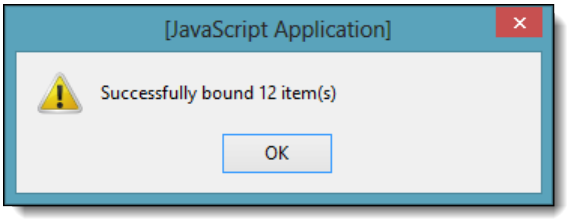
11. Scan or Enter the barcode for the item



12. Enter the callnumber for the item



13. Click *Ok*



Chapter 43. Routing

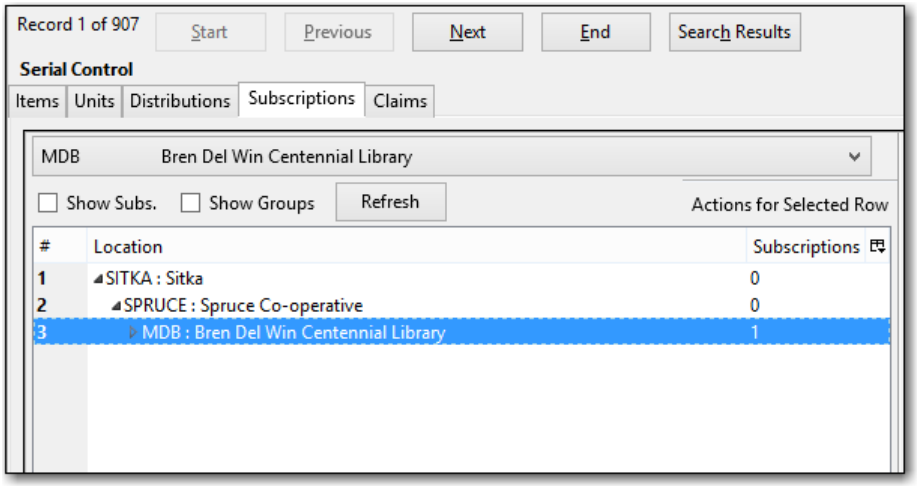
43.1. Serials Routing

A routing list is made up of “users,” who will receive a copy of a serial before that copy hits its regular shelving location. .

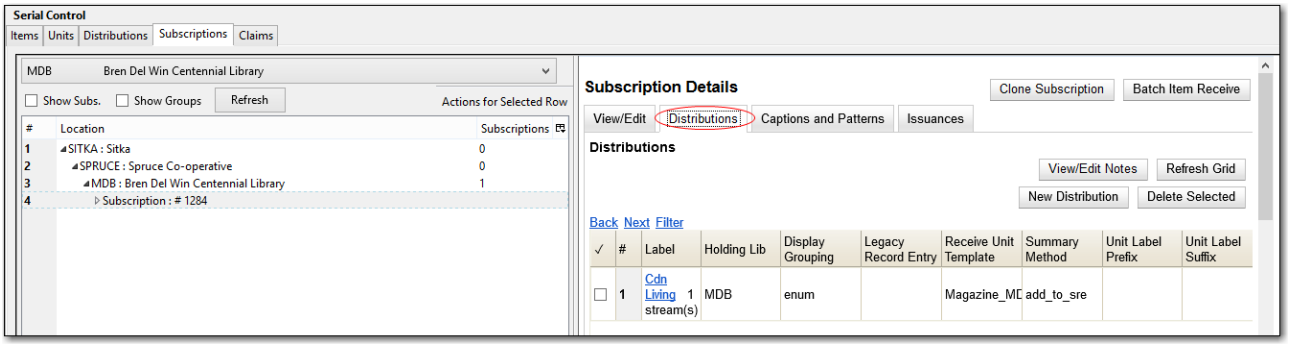
The following instructions assume that you have already setup a distribution as per 36.2.2 Create a Distribution

Depending on the status you have setup in the copy template editor, we suggest creating a copy template for "Routed" serials. The status for these items should be set to "In Process" or "Cataloguing". After the item has been routed around, it will need to be checked in to display a status of "Available"

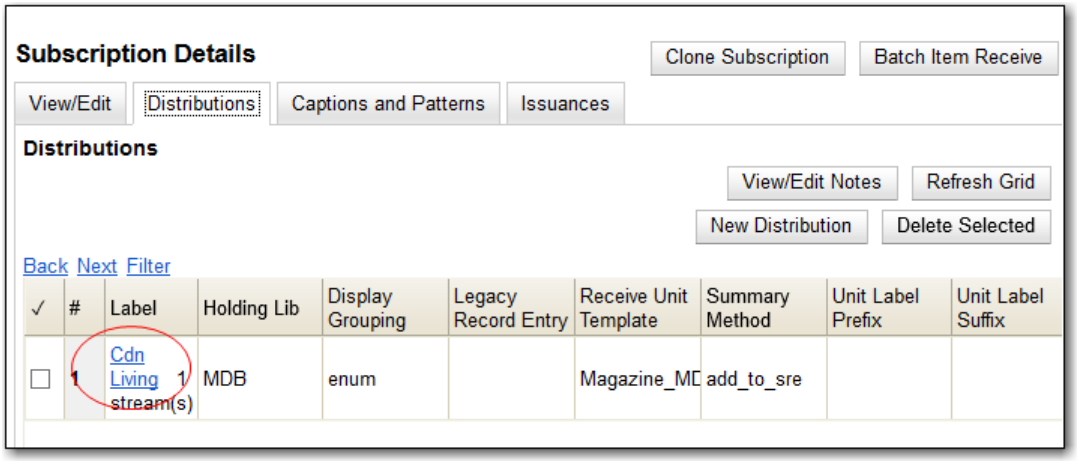
1. Search the catalogue. **(F3)**
2. Select the bibliographic record for the magazine or periodical.
3. Click on the title to open the *Record Details* screen.
4. Click on *Actions for this Record* and select *Serial Control View*.
5. Click on the *Subscriptions* tab.



6. Click on the arrow beside your Library
7. Click on the row with the Subscription #
8. Click on the Distribution tab on the right hand side of the screen

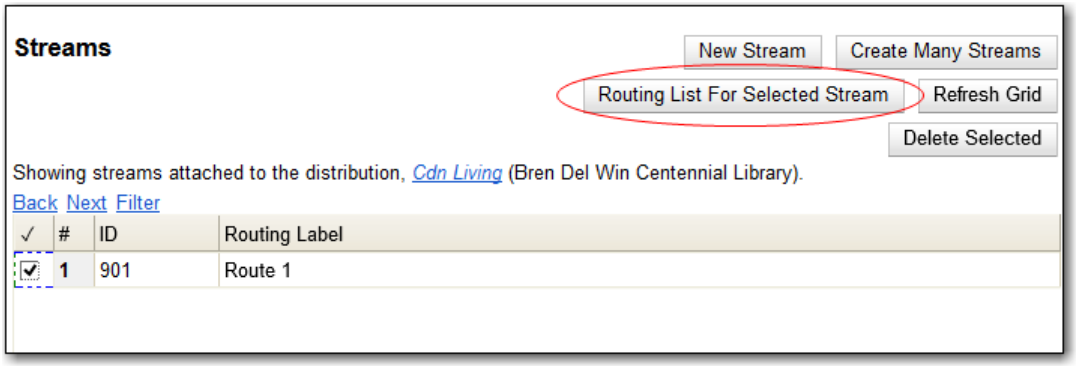


9. Click on the Hyperlinked *Label*



10. Select the target stream by checking the box

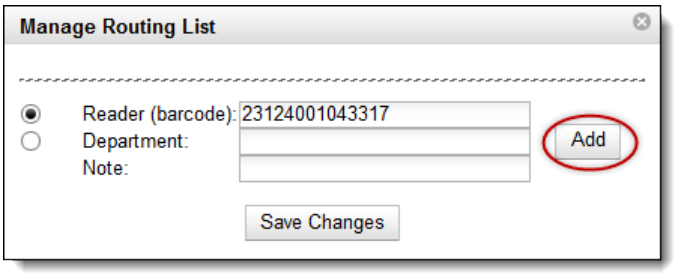
11. Click on *Routing List For Selected Stream*



12. Choose the radio button beside barcode or deparment

    - Barcode - enter the user barcode
    - Department - free form text field

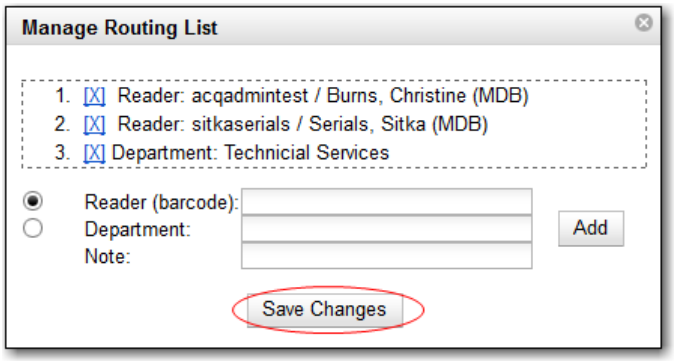
13. Click on *Add*



14. Repeat these steps for any additional Barcodes or Deparments

15. You can re-arrange users in the list by dragging and dropping each numbered row.

16. When you've got the list you want, click on *Save Changes*



43.2. Serials Batch Receive

In order to view and print the Routing Slip, you must receive your serials by *Serials Batch Receive*

1. Click on *Actions for this Record*

2. Select *Serials Batch Receive*

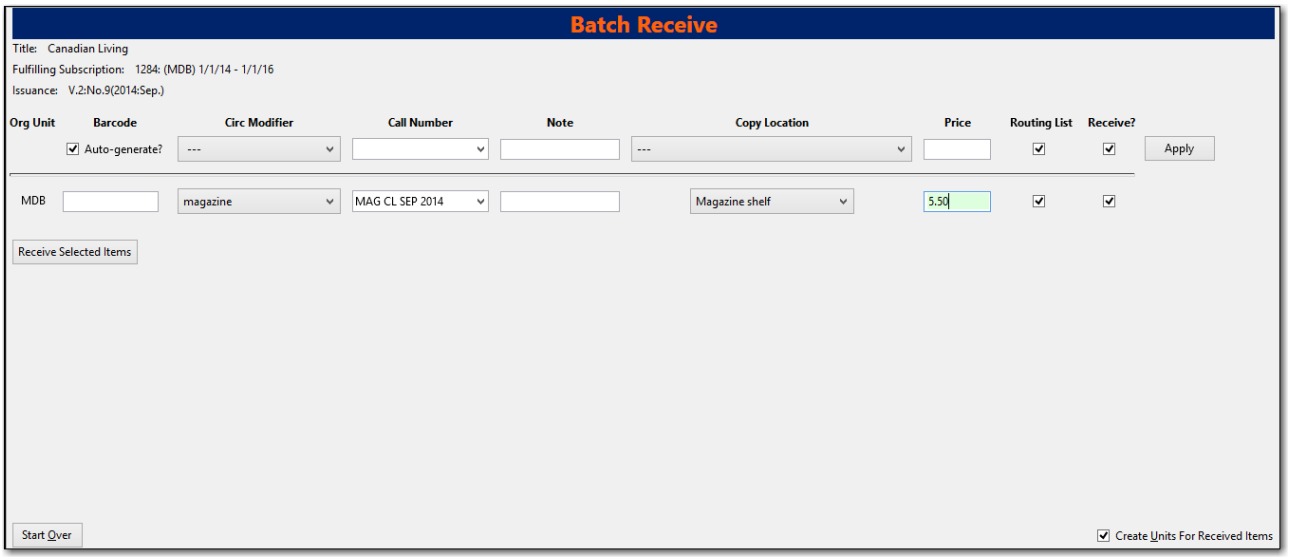
3. Make sure *Create Units for Received Items* is checked.

4. Choose an Issuance from the drop down menu

5. Click on *Next*

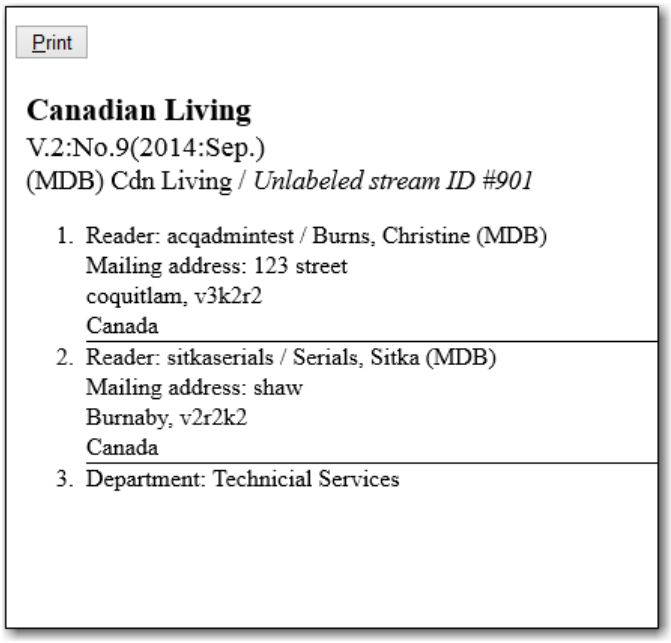
6. Fill in the required information.

- **Barcode** - Enter or Scan the item barcode
- **Circ Modifier** - Select the appropriate Circ Modifier
- **Call Numbe**r - Enter a Call Number
- **Note** - Enter a Note (Optional)
- **Copy Location** - Select the Copy Location
- **Price** - Enter a Price (Optional)
- **Routing List** - Make sure this box is checked
- **Receive-** Make sure this box is checked



7. Click on *Receive Selected Items*

8. Print Routing List



Chapter 44. Caption and Pattern Codes

44.1. Caption and Pattern Codes

Sitka support has created *Caption and Pattern Codes* for popular magazines and frequencies. Please copy and paste the whole string (Including Square brackets "[ ]") in the "Pattern Code" box.

Table 44.1. Popular Caption and Pattern Codes

Title	Database ID	Pattern Code	Notes
BC Business	108282856	[“2”,”0”,”8”,”1”,”a”,”v.”,”b”,”no.”,”u”,”12”,”v”,”r”,”i”,”(year)”,”j”,”	Monthly - 12 Issues / Year - With Enumeration captions
BC Home & Garden.	108225216	["2","0","8","1","a","v. ","b","no.","u","6","v","r","i","(year)","j","(month)","w","b","x","01"	Bi-Monthly - 6 Issues / Year
BC nature.	108527928	["2","0","8","1","a","V.","b","No.","u","4","v","r","i","(year)","j","(s	Seasonal - 4 Issues / Year Spring, Summer, Fall, Winter - with enumeration captions (V. No.)
BC outdoors sport fishing and outdoor adventure.	108419744	["2","0","8","1","a","v.","b","no.","u","6","v","r","i","(year)","j","(	Bi-Monthly - 6 Issues / Year Sport Fishing & 2 Hunting Editions - with enumeration captions (v. no.) modify issuance label to add "hunting or sports fishing"
Better homes and gardens.	108255191	[“2”,”0”,”8”,”1”,”a”,”v.”,”b”,”no.”,”u”,”12”,”v”,”r”,”i”,”(year)”,”j”,”	Monthly - 12 Issues / Year - with Enumeration captions
British Columbia history : Journal of the British Columbia Historical Federation.	108286944	["2","0","8","1","a","V.","b","No.","u","4","v","r","i","(year)","j","(s	Seasonal - 4 Issues / Year Spring, Summer, Fall, Winter - with Enumeration captions (V. No.)
British Columbia magazine.	108304607	["2","0","8","1","a","V.","b","No.","u","4","v","r","i","(year)","j","(s	Seasonal - 4 Issues / Year Spring, Summer, Fall, Winter - with enumeration captions (V. No.)
Canada's style at home.	108304570	["2","0","8","1","a","(year)","b","(month)","u","12","v","r","i","(year)"	Monthly - 12 Issues / Year - without enumeration captions
Canadian gardening.	108142330	["2","0","8","1","a","v.","b","no.","u","6","v","r","i","(year)","j","(se	Bi-Monthly - 6 Issues / Year - January, April, May, Summer, Autumn, Winter
Canadian geographic.	108304606	["2","0","8","1","a","(year)","b","(season)","u","4","v","r","i","(year)"	Seasonal - 4 Issues / Year Spring, Summer, Fall, Winter - without enumeration

Title	Database ID	Pattern Code	Notes
Canadian home workshop.	108286953	["2","0","8","1","a","v.","b",6,"Issues/Year","v.","no.","(year)","j","(se	Winter, March, Apr/May, Summer, September
Canadian house and home.	108286955	["2","0","8","1","a","v.","b","Monthly",12,"Issues/Year","(year)","j","(r	with enumeration captions (v. no.)
Canadian living.	108289179	["2","0","8","1","a","v.","b","Monthly",12,"Issues/Year","(year)","j","(r	with enumeration captions (v. no.)
Cooking light.	108304605	["2","0","8","1","a","v.","b","Monthly",12,"Issues/Year","(year)","j","(r	with enumeration captions (v. no.)
Cook's Illustrated.	108304588	["2","0","8","1","a","no.","i","Bi-Monthly",6,"Issues/Year","(year)","j","(m	Year - with enumeration caption (no.)
Country living.	108303839	["2","0","8","1","a","v.","b",10,"Issues/Year","v.","no.","(year)","j","(r	July/Aug combined - with enumeration captions (v. no.)
Crafts 'n things.	108304801	["2","0","8","1","a","V.","b","Seasonal",4,"Issues/Year","(year)","j","(s	Year Spring, Summer, Fall, Winter - with enumeration captions
Food network magazine.	108304833	["2","0","8","1","a","v.","b",10,"Issues/Year","v.","no.","(year)","j","(r	July/Aug combined - with enumeration captions (v. no.)
Gardens west.	108219964	["2","0","8","1","a","v.","b",9,"Issues/Year","v.","no.","(year)","j","(m	Feb, July/Aug, Nov/Dec combined
Hello! Canada	108221772	["2","0","8","1","a","No.","i","Weekly",52,"Issues/Year","(year)","j","(m	
Ladies' home journal.	108304836	["2","0","8","1","a","v.","b",11,"Issues/Year","v.","no.","(year)","j","(r	combined
Maclean's : Canada's national magazine.	108220410	["2","0","8","1","a","v.","b","Weekly",52,"Issues/Year","(year)","j","(	
Martha Stewart living.	108304837	["2","0","8","1","a","V.","b","Monthly",12,"Issues/Year","(year)","j","(	with enumeration captions
Natural health.	108420801	["2","0","8","1","a","v.","b","Bi-Monthly",6,"Issues/Year","(year)","j","(m	Year - with enumeration captions (v. no.)
O : the Oprah magazine.	108305645	["2","0","8","1","a","v.","b","Monthly",12,"Issues/Year","(year)","j","(r	with enumeration captions (v. no.)

Title	Database ID	Pattern Code	Notes
Organic gardening.	108220197	["2","0","8","1","a","v.","b","no.","u","6","v","c","i","(year)","j","(month)","k","(day)","w","w","x","01","y","odsu"]	6 issues/Year, D, J, F, M, A, M, J/J, A/S, O/N
Our Canada.	108528320	["2","0","8","1","a","v.","b","no.","u","6","v","c","i","(year)","j","(month)","k","(day)","w","w","x","01","y","odsu"]	6 issues/Year, D, J, F, M, A, M, J/J, A/S, O/N
PC Gamer	30251314	["2","0","8","1","a","no.","i","(year)","j","(month)","k","(day)","w","w","x","01","y","odsu"]	Monthly, 12 issues/Year, with enumeration captions (no.)
People weekly.	108142236	["2","0","8","1","a","v.","b","no.","u","52","v","c","i","(year)","j","(month)","k","(day)","w","w","x","01","y","odsu"]	Weekly, 52 issues/Year

Sample Sets of Serial Patterns

To use one of the following codes you must copy and paste all the text inside and including the square brackets [ ].

DAILY:

- Omitted Sunday. 6x a week, but not Sunday:

  ["2","0","8","1","a","no,","i","(year)","j","(month)","k","(day)","w","d","x","01","y","odsu"]

WEEKLY:

- Increments continuously without volume number:

  ["2","0","8","1","a","no.","i","(year)","j","(month)","k","(day)","w","w"]

- Increments continuously with volume number:

  ["2","0","8","1","a","Vol.","b","No.","u","52","v","c","i","(year)","j","(month)","k","(day)","w","w","x","01"]

- Restart with volume number:

  ["2","0","8","1","a","Vol.","b","no.","u","52","v","r","i","(year)","j","(month)","k","(day)","w","w","x","01"]

26 Times a year (and variations):

- 26 times a year. Increments continuously without volume:

  ["2","0","8","1","a","no.","i","(year)","j","(month)","k","(day)","w","e","x","01"]

- 26 times a year. Increments continuously with volume:

  ["2","0","8","1","a","Vol.","b","no.","u","26","v","c","w","e","x","01"]

- 26 times a year. Restart with volume:

  ["2","0","8","1","a","Vol.","b","no.","u","26","v","r","i","(year)","j","(month)","k","(day)","w","w","x","01","y"]

- 26 times a year. Restart, year used as volume:

  ["2","0","8","1","a","Vol.","b","no.","u","26","v","r","w","e","x","01"]

- 24 times a year. Restart, year used as volume:

["2","0","8","1","a","Vol.","b","no.","u","24","v","r","w","e","x","01"]

MONTHLY (and variations):

- Names of months without volume:

  ["2","0","8","1","i","(year)","j","month","w","m"]

- Increments continuously without volume number:

  ["2","0","8","1","a","No.","i","(year)","j","(month)","w","m","x","01"]

- Increments continuously with volume number:

  ["2","0","8","1","a","Vol.","b","no.","u","12","v","c","i","(year)","j","(month)","w","m","x","01"]

- Restart without volume number:

  ["2","0","8","1","a","Vol.","b","No.","u","12","v","r","w","m","x","01"]

- Restart with volume number:

  ["2","0","8","1","a","vol.","b","no.","u","12","v","r","i","(year)","j","(month)","w","m","x","01"]

- 11 times a year. Increments continuously without volume number:

  ["2","0","8","1","a","No.","u","11","v","c","i","(year)","j","(month)","w","m","x","01","y","om08"]

- 11 times a year. Increments continuously with volume number:

  ["2","0","8","1","a","Vol.","b","No.","u","11","v","c","i","(year)","j","(month)","w","m","x","01","y","om08"]

- 11 times a year. Restart without volume number:

  ["2","0","8","1","a","No.","u","11","v","c","i","(year)","j","(month)","w","m","x","01","y","om08"]

- 11 times a year. Restart with volume number:

  ["2","0","8","1","a","vol.","b","no.","u","11","v","r","i","(year)","j","(month)","w","m","x","01","y","om08"]

- 10 times a year with volume number. Increments continuously and no issues in August and September:

  ["2","0","8","1","a","Vol.","b","no.","u","10","v","c","i","(year)","j","(month)","w","m","x","01","y","om08","y","om09"]

- 10 times a year, without volume number. Increments continuously, no issues in August and September:

  ["2","0","8","1","a","no.","u","10","v","c","i","(year)","j","(month)","w","m","x","01","y","om08","y","om09"]

- 10 times a year. Restart, year used as volume number (no issues in January and August):

  ["2","0","8","1","a","Vol.","b","No.","u","10","v","r","w","m","x","01","y","om01","y","om08"]

- 9 times a year. Restart and year used as volume number:

  ["2","0","8","1","a","Vol.","b","No.","u","9","v","r","w","m","x","01","y","om06","y","om07","y","om08"]

- 8 times a year. Restart and year used as volume number:

  ["2","0","8","1","a","Vol.","b","No.","u","8","v","r","w","m","x","01","y","om01","y","om03","y","om06","y","om08"]

- 8 times a year. Increments continuously and year used as volume number:

  ["2","0","8","1","a","Vol.","b","No.","u","8","v","c","w","m","x","01","y","om01","y","om03","y","om06","y","om08"]

- 7 times a year. Restart and year used as volume number:

  ["2","0","8","1","a","Vol.","b","No.","u","7","v","r","w","m","x","01","y","om01","y","om03","y","om06","y","om08","y","

- 5 times a year. Restart on volume:

  ["2","0","8","1","a","vol.","b","no.","u","5","v","r","i","(year)","j","(month)","w","b","x","01","y","om09","y","om12"]

- 5 times a year. Increments continuously on volume:

  ["2","0","8","1","a","vol.","b","no.","u","5","v","c","i","(year)","j","(month)","w","b","x","01","y","om09","y","om12"]

- 5 times a year. Increments continuously on volume:

  ["2","0","8","1","a","no.","u","5","v","c","i","(year)","j","(month)","w","b","x","01","y","om09","y","om12"]

Bimonthly:

- Bimonthly. Restart with volume:

  ["2","0","8","1","a","vol.","b","no.","u","6","v","r","i","(year)","j","(month)","w","b","x","01"]

- Bimonthly. Restart without volume:

  ["2","0","8","1","a","Vol.","b","No.","u","6","v","r","w","b","x","01"]

- Bimonthly. Increments continuously without volume:

  ["2","0","8","1","a","no.","u","6","v","c","i","(year)","j","(month)","w","b","x","01"]

- Bimonthly. Increments continuously with volume:

  ["2","0","8","1","a","vol.","b","no.","u","6","v","c","i","(year)","j","(month)","w","b","x","01"]

Three times a year:

- Three times a year without volume and increments continuously:

  ["2","0","8","1","a","No.","u","3","v","c","i","(year)","j","(month)","w","t","x","01"]

- Three times a year with volume and increments continuously:

  ["2","0","8","1","a","Vol.","b","No.","u","3","v","c","i","(year)","j","(month)","w","t","x","01"]

- Three times a year with volume and restart:

  ["2","0","8","1","a","Vol.","b","No.","u","3","v","r","i","(year)","j","(month)","w","t","x","01"]

- Three times a year with volume and restart, starting in July:

  ["2","0","8","1","a","Vol.","b","no.","u","3","v","r","i","(year)","j","(month)","w","t","x","07"]

- Three times a year with volume and restart, starting in August:

  ["2","0","8","1","a","Vol.","b","no.","u","3","v","r","i","(year)","j","(month)","w","t","x","08"]

- Three times a year without volume with restart:

  ["2","0","8","1","a","Vol.","b","No.","u","3","v","r","w","t"]

Quarterly:

- Quarterly. Increments continuously and volume:

  ["2","0","8","1","a","vol.","b","no.","i","(year)","j","(month)","w","q","x","01"]

- Quarterly. Increments continuously and volume, starting in July:

  ["2","0","8","1","a","vol.","b","no.","i","(year)","j","(month)","w","q","x","06"]

- Quarterly. Increments continuously without volume:

  ["2","0","8","1","a","no.","i","(year)","j","(month)","w","q","x","01"]

- Quarterly. Restart and volume number:

  ["2","0","8","1","a","Vol.","b","no.","u","4","v","r","i","(year)","j","(month)","w","q","x","01"]

- Quarterly. Restart and year used as volume number:

  ["2","0","8","1","a","Vol.","b","No.","u","4","v","r","w","q","x","01"]

- Quarterly. Restart and volume, starting in March:

  ["2","0","8","1","a","Vol.","b","no.","u","4","v","r","i","(year)","j","(month)","w","q","x","03"]

- Quarterly. Restart and volume, starting in July:

  ["2","0","8","1","a","Vol.","b","No.","u","4","v","r","i","(year)","j","(month)","w","q","x","07"]

- Quarterly. Restart and volume, starting in October:

  ["2","0","8","1","a","Vol.","b","No.","u","4","v","r","i","(year)","j","(month)","w","q","x","10"]

Half-yearly:

- Half-yearly. Increments continuously without volume number:

  ["2","0","8","1","a","no.","i","(year)","j","(month)","w","f","x","01"]

- Half-yearly. Increments continuously with volume number:

  ["2","0","8","1","a","Vol.","b","no.","i","(year)","j","(month)","w","f","x","01"]

- Half-yearly. Restart with volume number:

  ["2","0","8","1","a","Vol.","b","No.","u","2","v","r","w","f","x","01"]

- Half-yearly. Restart without volume number:

  ["2","0","8","1","a","Vol.","b","No.","u","2","v","r","w","f","x","01"]

Annually:

- Annual report:

  ["2","0","8","1","i","(year)","w","a"]

- Annual report. Increments continuously:

  ["2","0","8","1","a","no.","i","(year)","w","a","x","01"]

- Annual report. Increments continuously with volume number:

  ["2","0","8","1","a","Vol.","b","No.","u","1","v","c","i","(year)","w","a","x","01"]

Part VII. Booking Module

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Chapter 45. Using the Booking Module

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With the Evergreen Booking Module you can reserve catalogued (bibliographic) or non-catalogued (non-bibliographic) items for a particular patron for a specified time period. This chapter will help staff create reservations, generate pull lists for reserved items, capture reserved resources, and pick up and return reservations.

The Booking Module allows you to lend out non-bibliographic items. They are called resources in Evergreen. Almost anything you lend out can be entered as a resource. Laptops, projectors, cables, ski locks, bike locks, cameras, easels, meeting rooms, even staplers can be lent using the Booking Module.

The Booking Module can also be used to reserve bibliographic items. For example, do you have a special program coming up that you need all the books on ducks for? You can reserve them for the specific day of your program to make sure they will come back and are not checked out when getting near to your program day.

45.1. Evergreen Booking Tutorial

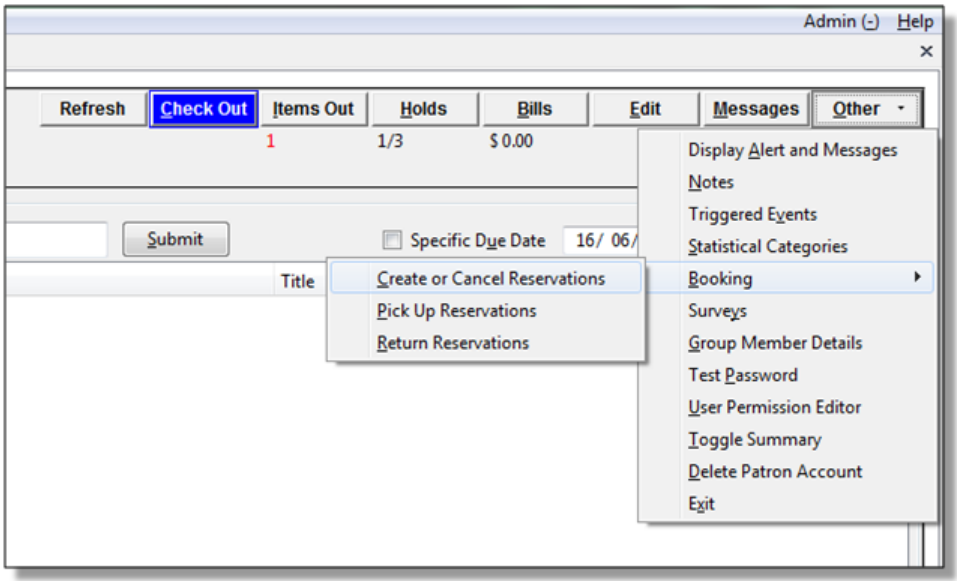
45.2. Creating a Booking Reservation

Only staff members may create reservations. A reservation can be started from a patron record, or a booking resource. To reserve catalogued items, you may start from searching the catalogue, if you do not know the booking item's barcode.

To create a reservation from a patron record:

1. Retrieve the patron's record.

2. Select *Other* → *Booking* → *Create or Cancel Reservations*. This takes you to the Reservations Screen.

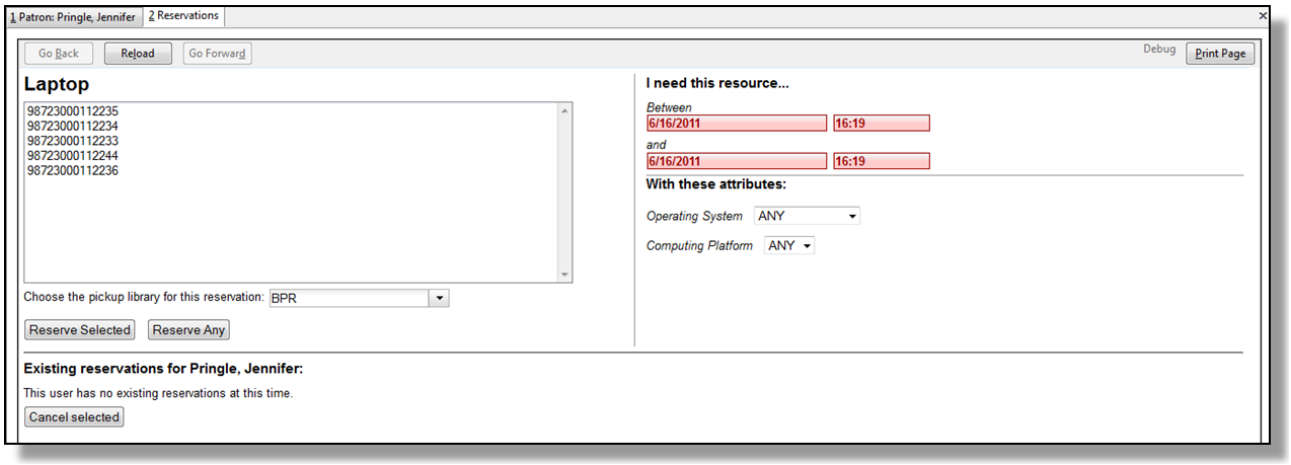


3. For non-catalogued items, choose a Bookable Resource Type and click *Next*. For catalogued items, enter the barcode in *Enter the barcode of a catalogued, bookable resource* box, then click *Next* beside the box.

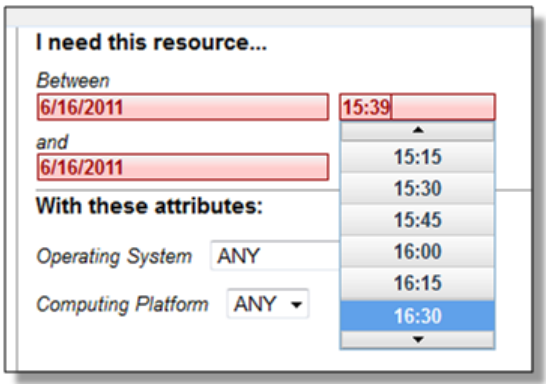
1 Patron: Pringle, Jennifer
2 Reservations
Go Back
Reload
Go Forward
Debug
Print Page
Choose a Bookable Resource Type
Ereader
Laptop
Projector
Room
Video Connector
Next
- Or -
Enter the barcode of a cataloged, bookable resource:
Next
To reserve an item that is not yet registered as a bookable resource, find it in the catalog or under Display Item, and select Make Item Bookable or Book Item Now there.
Existing reservations for Pringle, Jennifer:
This user has no existing reservations at this time.
Cancel selected

4. For non-catalogued resources, the Bookable Resource Type and the items associated with the type will appear.

   For catalogued items, the title and the item will display in the box.

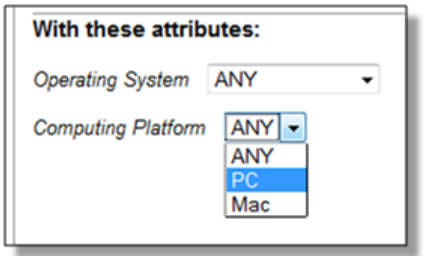


5. Select the date and time for the reservation in *I need this resource...* area. Click the date field. A calendar widget will be displayed for you to choose a date. Click the time field to choose time from the dropdown list.

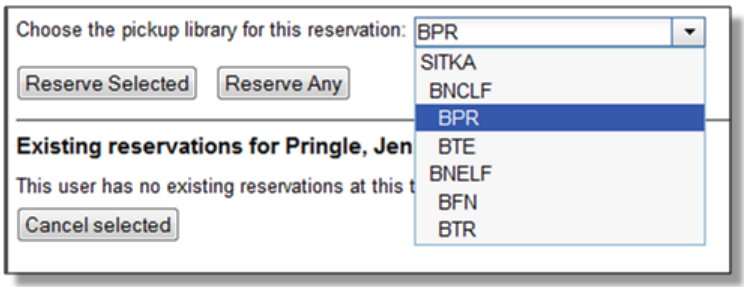


If incorrect date and time is selected, the date/time boxes will appear in red. For example, if the time for which the reservation is set has already passed, the boxes will appear in red. There must be at least 15 minutes between the creation of the reservation and the start time of the reservation.

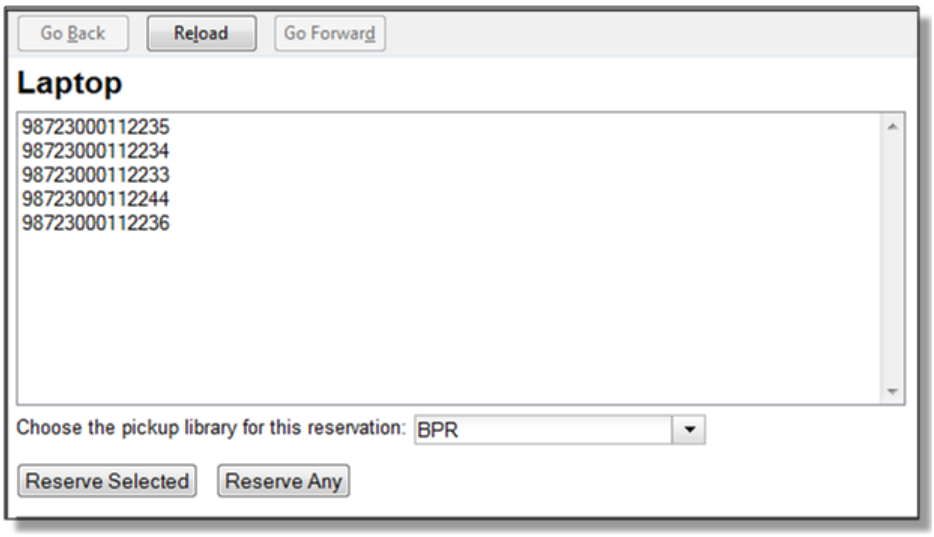
6. For non-catalogued resources, patrons may specify special feature(s), if any, of the resource. *With these attributes:* allows you to do so. For example, if a patron is booking a laptop he/she can choose between PC and Mac and even choose a specific operating system if they need to. Click the drop down arrow to select your option from the list.



7. Select the pickup location from the dropdown list.

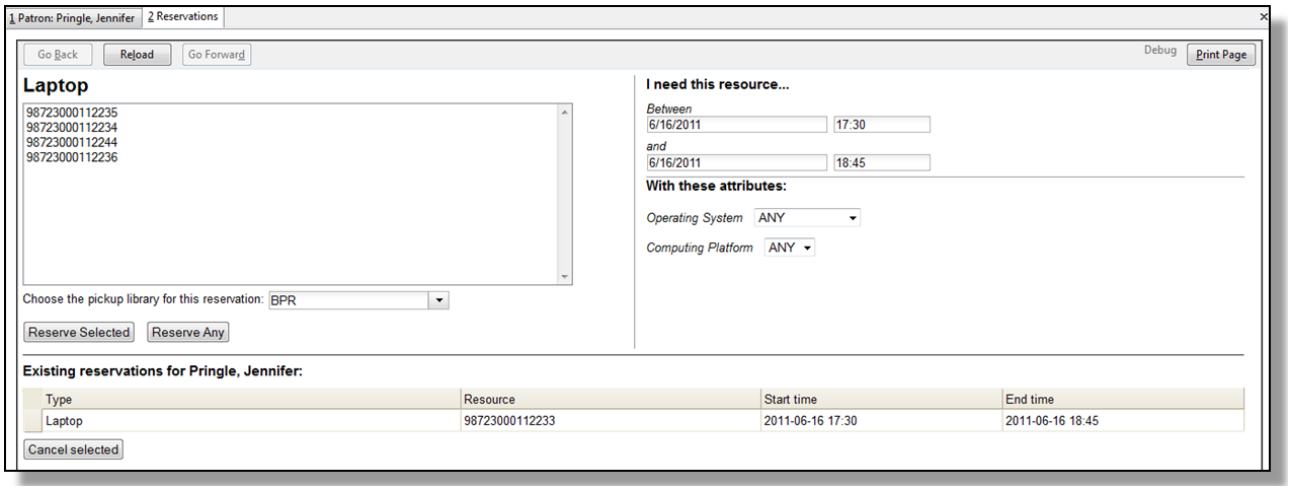


8. If there are multiple copies of the resource and any item listed is acceptable, click *Reserve Any*. To choose a specific item, select it and then click *Reserve Selected*.



9. A message will confirm that the action succeeded. Click *OK* on the prompt.

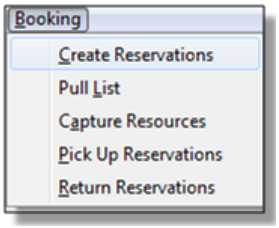
10. The screen will refresh and the reservation will appear below the patron's name at the bottom of the screen.



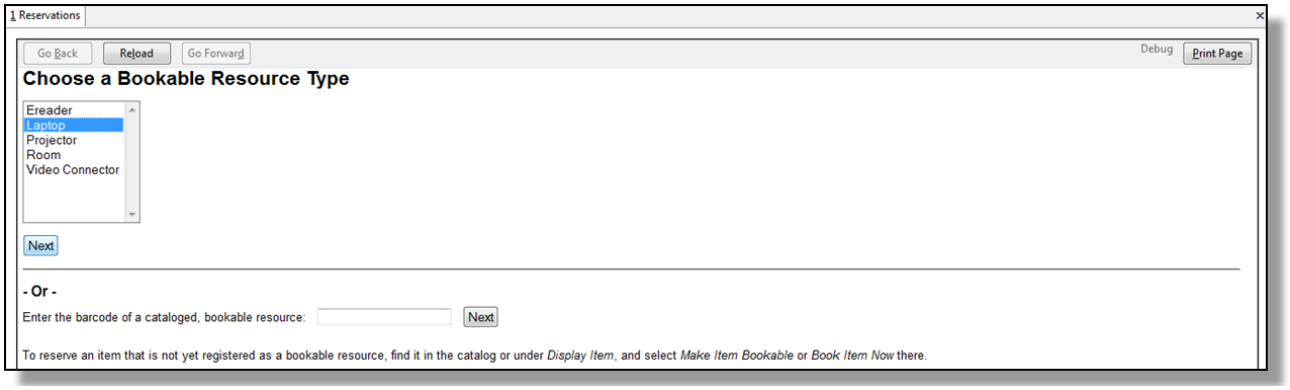
To create a reservation from a booking resource:

You need to know the barcode of the patron when you create a reservation for him/her from a booking resource.

1. From the *Booking* menu, select *Create Reservations*

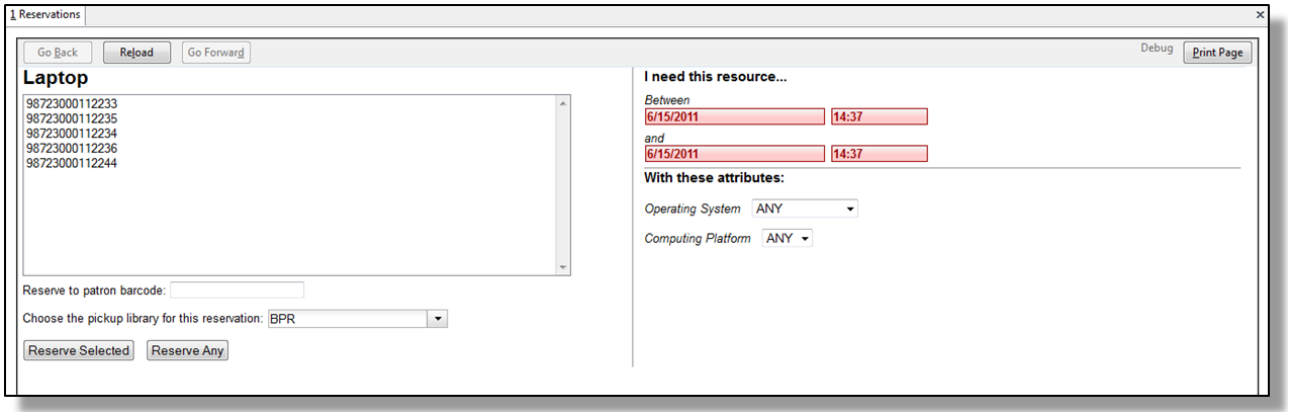


2. Choose a Bookable Resource Type and click *Next* or enter the barcode of a catalogued resource and click *Next*.



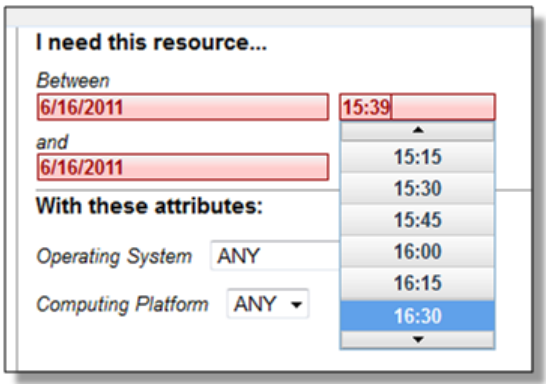
3. For non-catalogued resources, a screen showing the Bookable Resource Type and the items associated with the type will appear.

   For catalogued resources, the title and item will appear.



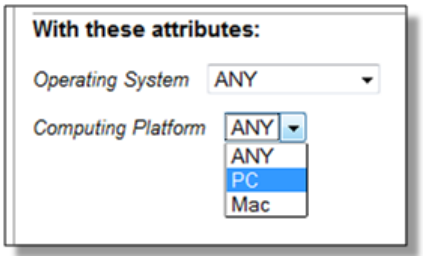
4. Enter the user's barcode in the *Reserve to patron barcode* box. The user's existing reservations, if any, will appear at the bottom of the screen.

5. Select the date and time for the reservation in *I need this resource...* area. Click the date field. A calendar widget will be displayed for you to choose a date. Click the time field to choose time from the dropdown list.

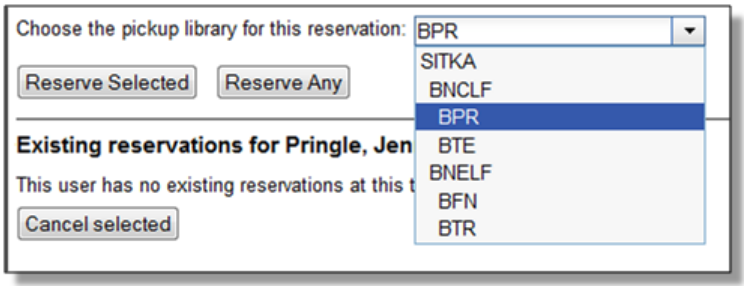


If incorrect date and time is selected, the date/time boxes will appear in red. For example, if the time for which the reservation is set has already passed, the boxes will appear in red. The times must be set correctly for the reservation to be created. There must be at least 15 minutes between the creation of the reservation and the start time of the reservation.

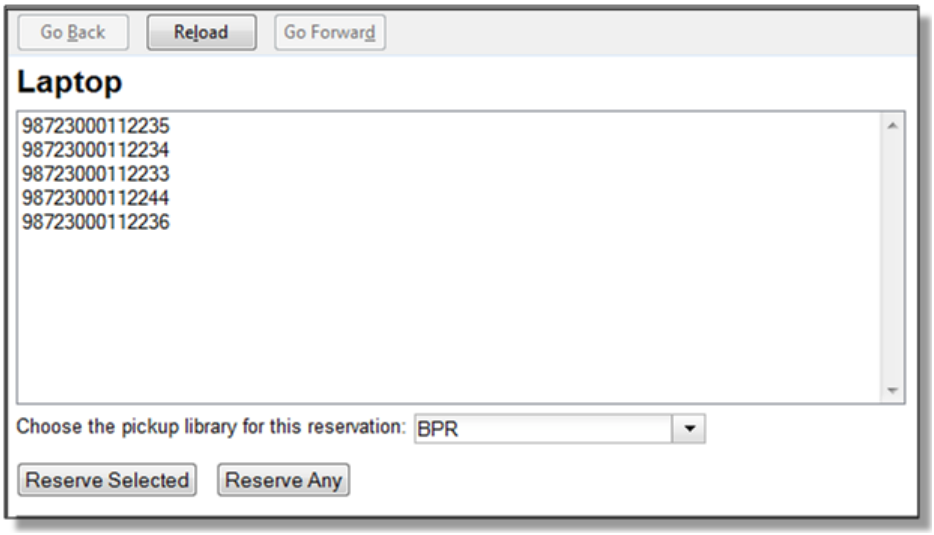
6. For non-catalogued resources, patrons may specify special feature(s), if any, of the resource. The *With these attributes:* allows you to do so. For example, if a patron is booking a laptop they can choose between PC and Mac and even choose a specific operating system if they need to. Click the dropdown arrow to select your option from the list.



7. Select the pickup location from the dropdown list.

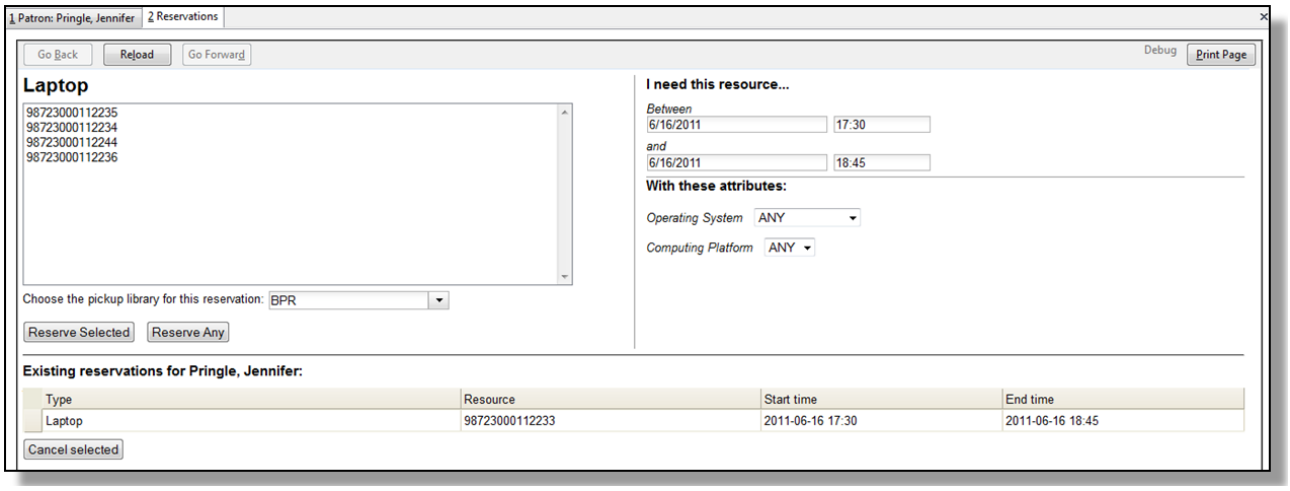


8. If there are multiple copies of the resource and any item listed is acceptable, click *Reserve Any*. To choose a specific item, select it and then click *Reserve Selected*.



9. A message will confirm that the action succeeded. Click *OK* on the prompt.

10. The screen will refresh and the reservation will appear below the patron's name at the bottom of the screen.



Search the catalogue to create a reservation

If you would like to reserve a catalogued item but do not know the item barcode, you may start with a catalogue search.

1. In the staff client, select *Cataloguing* → *Search the Catalogue* or keyboard shortcut **F3** to search for the item you wish to reserve. You may search by any bibliographic information.

2. Click the title to display the record summary. In the Copy Summary, select *Copy Details* in *Actions* column.

3. The *Copy Details* will appear in a new row. In the *barcode* column, click the *book now* link.

4. A screen showing the title and barcodes of available copies will appear.

5. Enter the user's barcode in the *Reserve to patron barcode* box. The user's existing reservations, if any, will appear at the bottom of the screen.

6. Select the date and time in *I need this resource...* section. If the date and time set is incorrect the boxes appear in red. For example, if the time for which the reservation is set has already passed, the boxes will appear in red.

7. Select pickup location. If there are multiple copies and any of the listed items is acceptable, click *Reserve Any*. To choose a specific item, select it and then click *Reserve Selected*.

8. A message will confirm that the action succeeded. Click *OK* on the prompt.

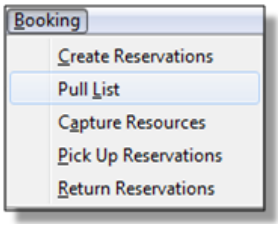
9. The screen will refresh, and the reservation will appear below the user's name.

Reservations on catalogued items can be created on *Item Status (F5)* screen. Select the item, then *Actions for Selected Items → Book Item Now*.

45.3. Reservation Pull List

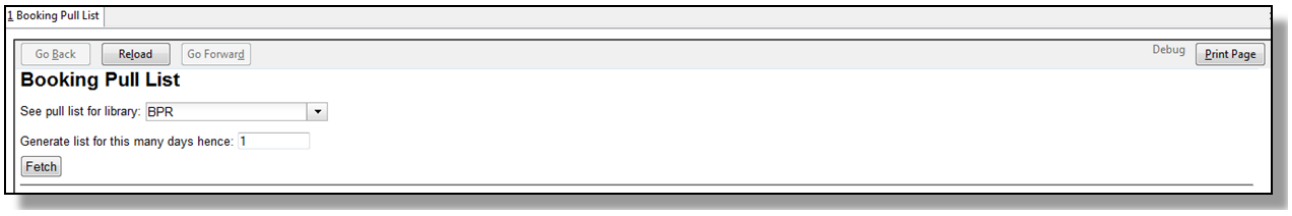
Reservation pull list can be generated dynamically on the Staff Client.

1. To create a pull list, select *Booking → Pull List*.

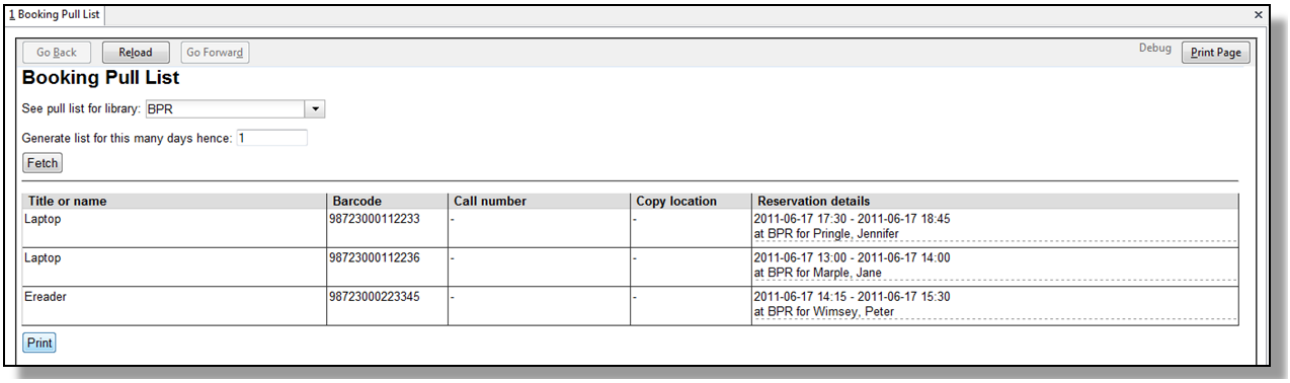


2. You can decide how many days in advance you would like to pull reserved items. Enter the number of days in the box adjacent to *Generate list for this many days hence*. For example, if you would like to pull items that are needed today, you can enter **1** in the box, and you will retrieve items that need to be pulled today.

3. Click *Fetch* to retrieve the pull list.



4. The pull list will appear. Click *Print* to print the pull list.

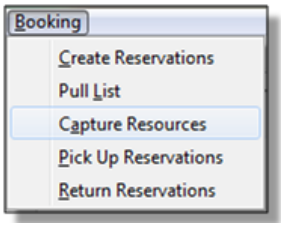


45.4. Capturing Items for Reservations

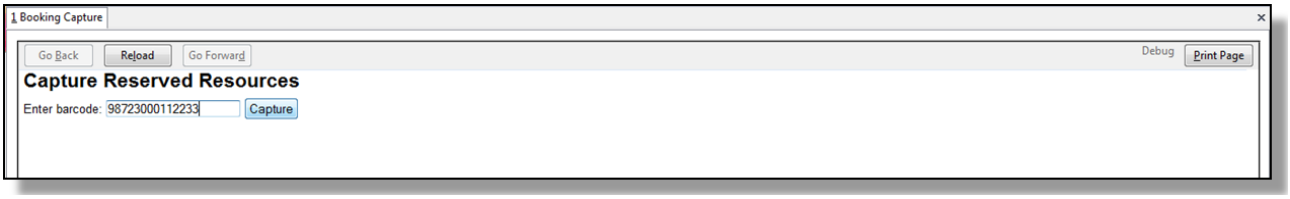
Reservations must be *captured* before they are ready to be picked up by the patron.

Always capture reservations in *Booking Module*. *Check In* function in *Circulation* does not function the same as *Capture Resources*.

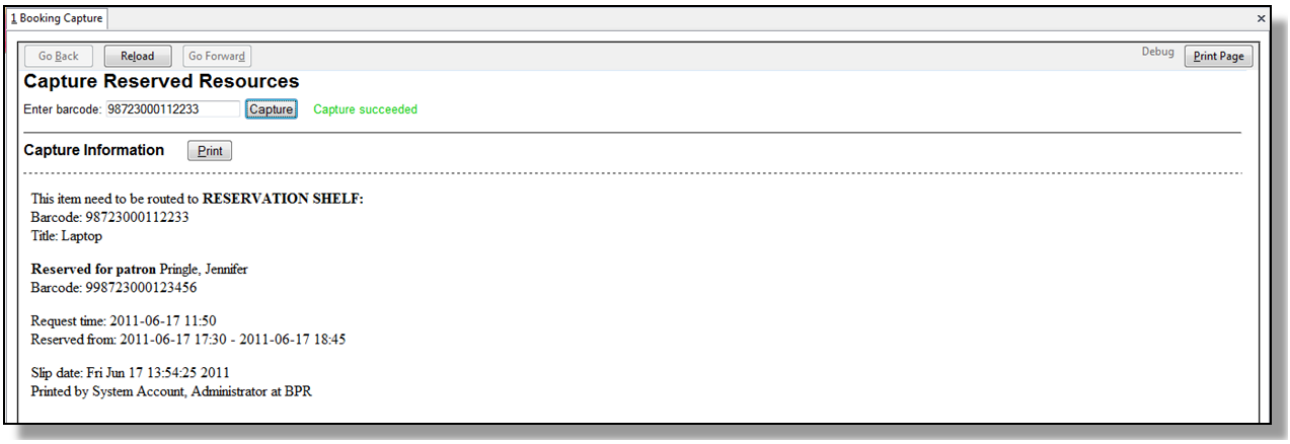
1. In the staff client, select *Booking* → *Capture Resources*.



2. Scan the item barcode or type the barcode then click *Capture*.



3. The message *Capture succeeded* will appear to the right. Information about the item will appear below the message. Click *Print* button to print a slip for the reservation.

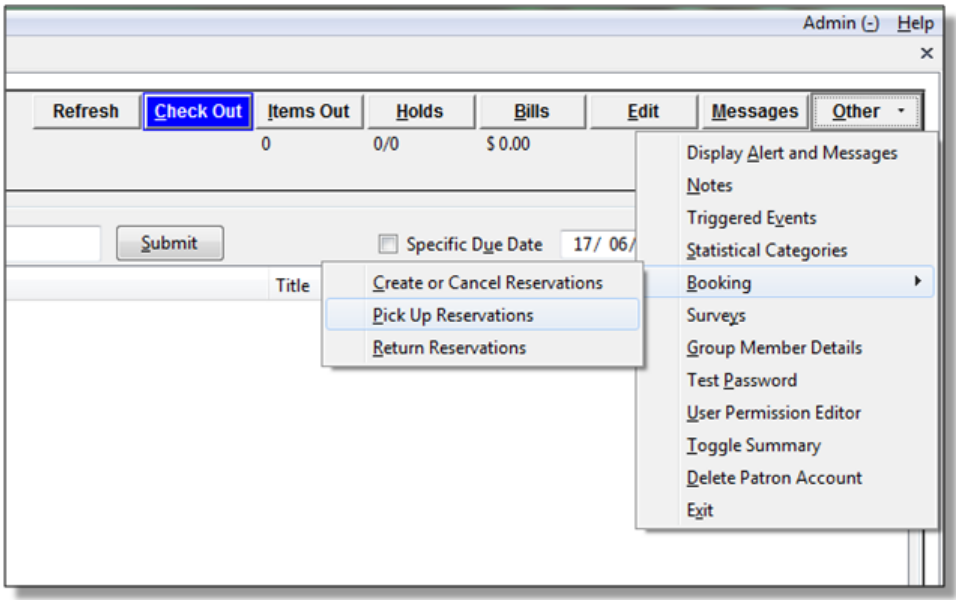


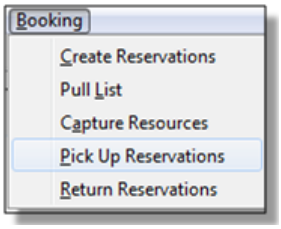
Sitka Team strongly recommends printing the receipt or copying the reservation information. It is not possible to re-print the slip on the current Evergreen design.

45.5. Picking Up Reservations

Always use the dedicated *Booking Module* interfaces for tasks related to reservations. Items that have been captured for a reservation cannot be checked out using the *Check Out* interface, even if the patron is the reservation recipient.

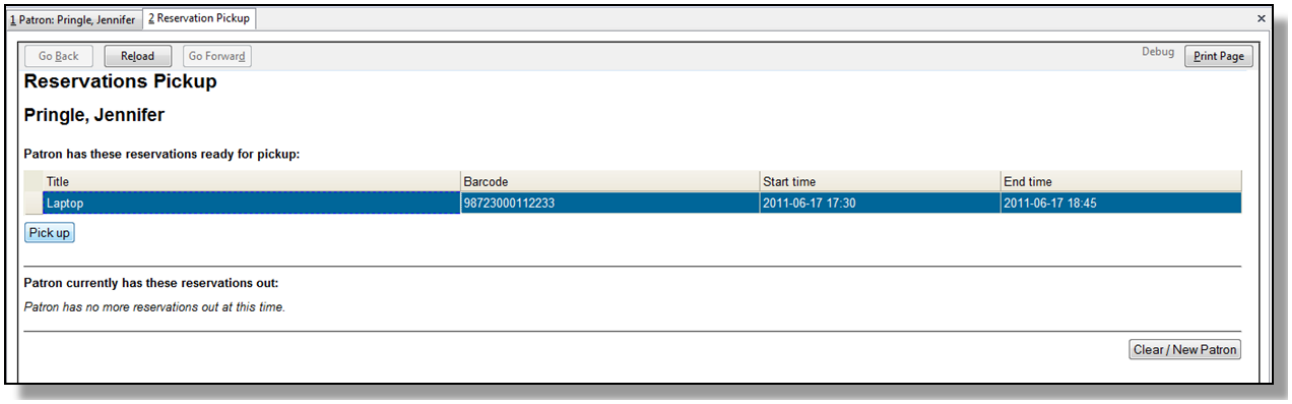
1. Ready-for-pickup reservations can be listed from *Other* → *Booking* → *Pick Up Reservations* within a patron record or *Booking* → *Pick Up Reservations*.



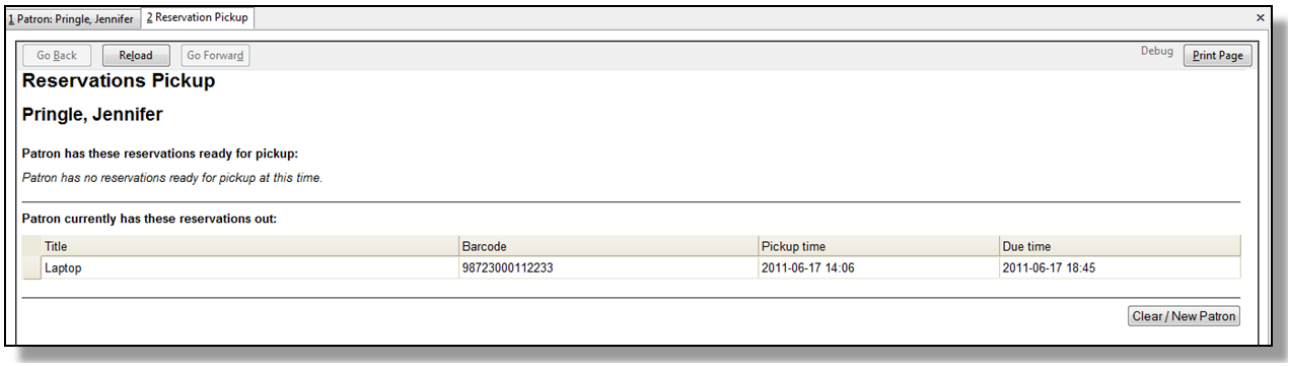


2. Scan the patron barcode if using *Booking → Pick Up Reservations*.

3. The reservation(s) available for pickup will display. Select those you want to pick up and click *Pick Up*.



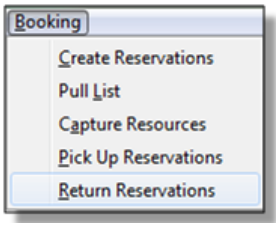
4. The screen will refresh to show that the patron has picked up the reservation(s).



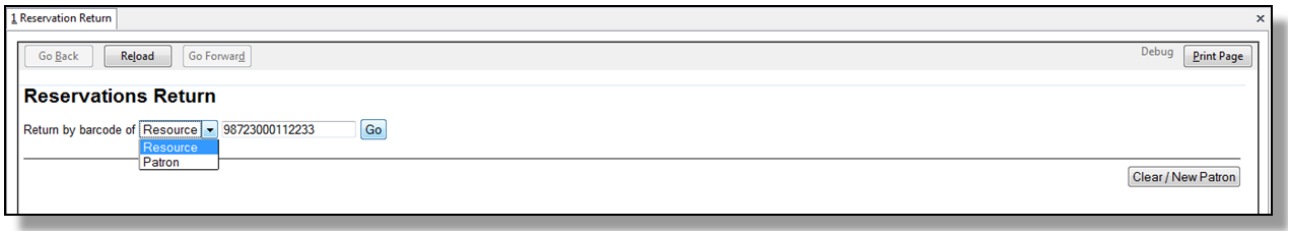
45.6. Returning Reservations

When a reserved item is brought back, staff must use the *Booking Module* to return the reservation.

1. To return reservations, select *Booking* → *Return Reservations*

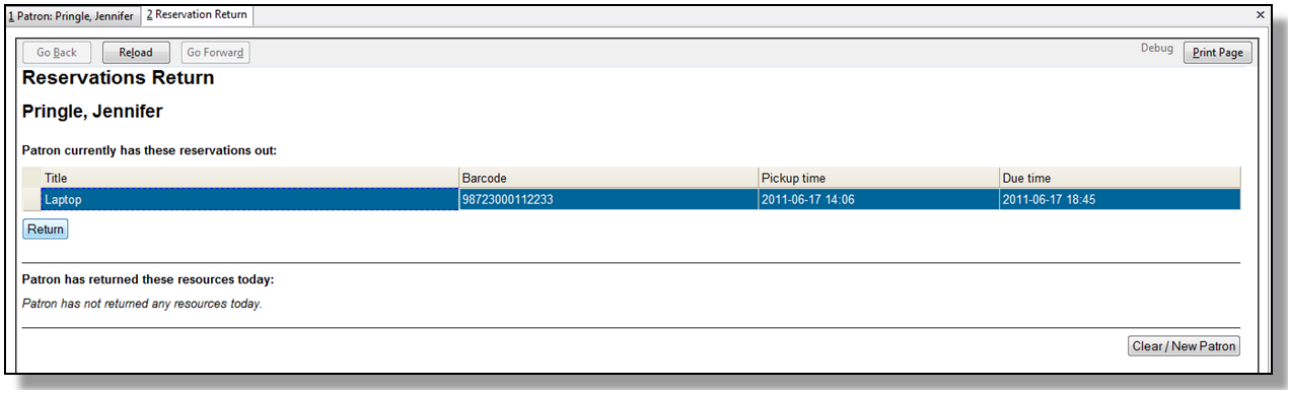


2. You can return the item by patron or item barcode. Here we choose *Resource* to return by item barcode. Scan or enter the barcode, and click *Go*.

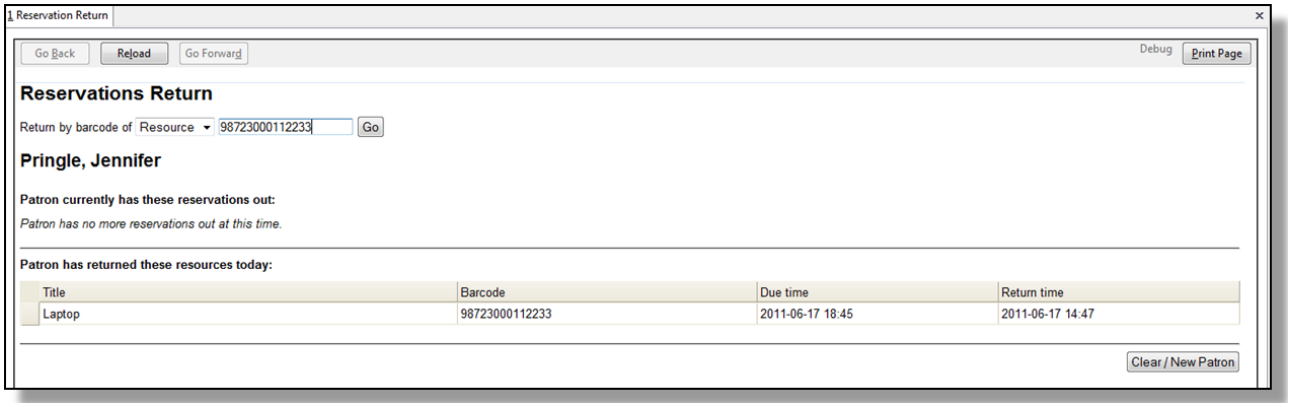


3. A pop up box will tell you that the item was returned. Click *OK* on the prompt.

4. If we select *Patron* on the above screen, after scanning the patron's barcode, reservations currently out to that patron are displayed. Highlight the reservations you want to return, and click *Return*.



5. The screen will refresh to show any resources that remain out and the reservations that have been returned.



Reservations can be returned from within patron records by selecting *Other* → *Booking* → *Return Reservations*

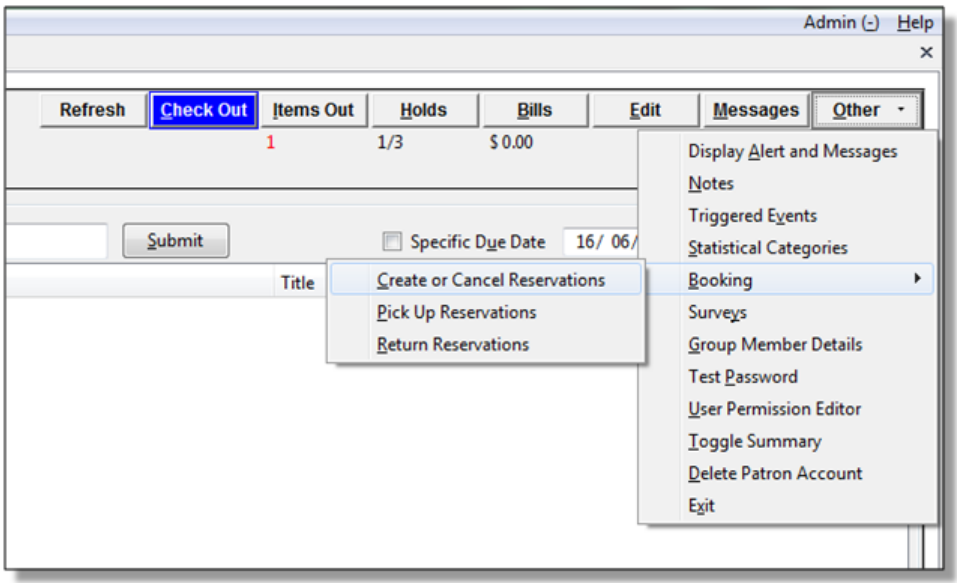
45.7. Cancelling a Reservation

A reservation can be cancelled in a patron’s record or reservation creation screen.

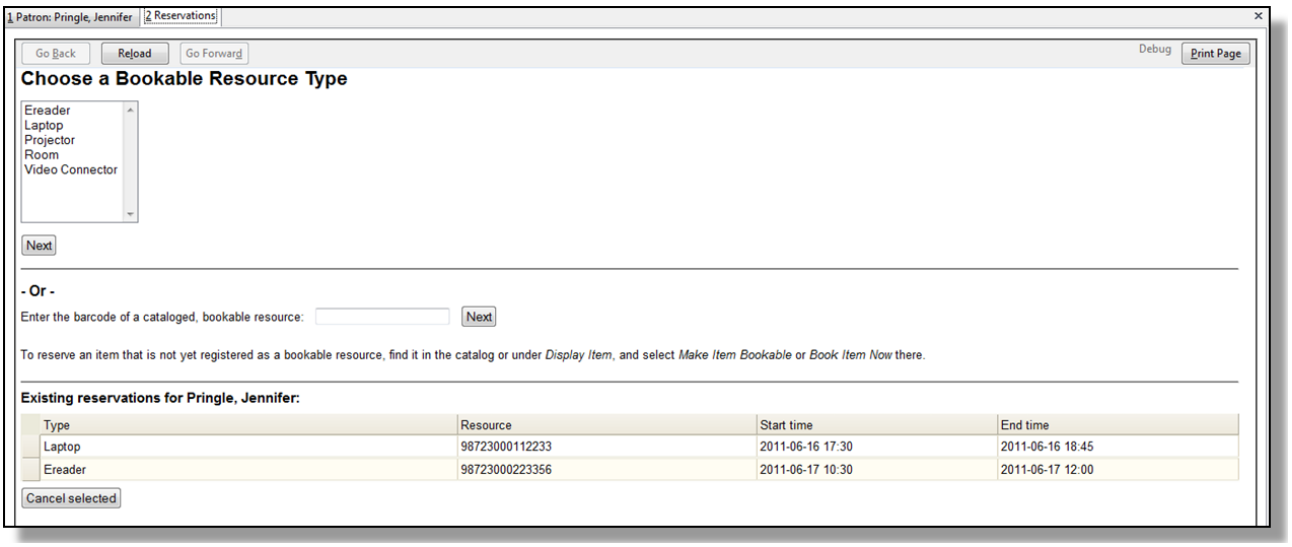
Cancel a reservation from the patron record

1. Retrieve the patron's record.

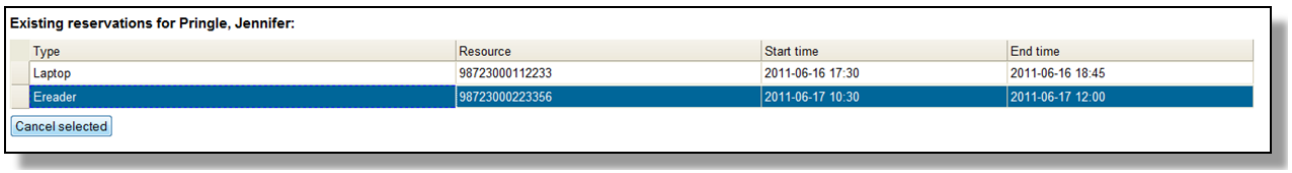
2. Select *Other* → *Booking* → *Create or Cancel Reservations*.



3. The existing reservations will appear at the bottom of the screen.



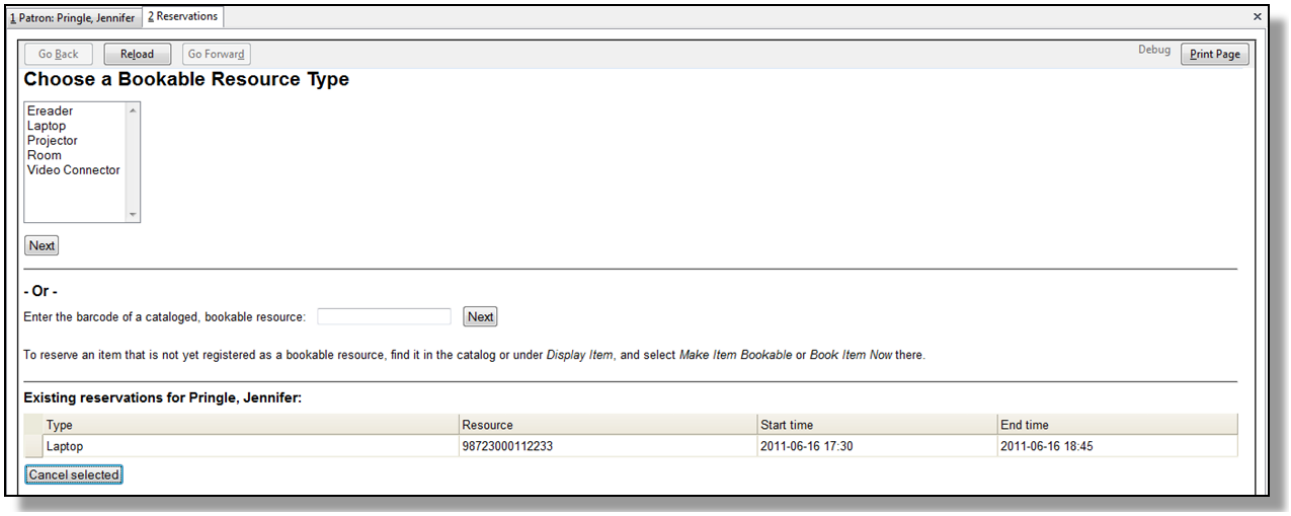
4. Highlight the reservation that you want to cancel. Click *Cancel Selected*.



Use **Shift** or **Ctrl** on keyboard and mouse click to select multiple reservations if needed.

5. A pop-up window will confirm the cancellation. Click *OK* on the prompt.

6. The screen will refresh, and the cancelled reservation(s) will disappear.



Cancel a reservation on reservation creation screen

1. Access the reservation creation screen by selecting *Booking* → *Create Reservations*.
2. Select any Bookable Resource Type, then click *Next*.
3. Scan or type in the patron barcode in *Reserve to Patron* box then hit *Enter*.
4. Patron's existing reservations will display at the bottom of the screen.
5. Select those that you want to cancel, then click *Cancel Selected*.

Chapter 46. Booking Module Administration

Adapted with permission from original material by the Evergreen Community

This chapter describes how to create, edit and delete bookable non-bibliographic resources.

Sitka default permissions allow staff members with Circulation privileges to create reservations on all catalogued items or bookable non-bibliographic resources, and to create bookable non-bibliographic resources.

46.1. Local System Administrator Booking Tutorials

46.2. Creating Bookable Non-Bibliographic Resources

Staff with the required permissions (Circulator and above) can create bookable non-bibliographic resources such as laptops, projectors, and meeting rooms.

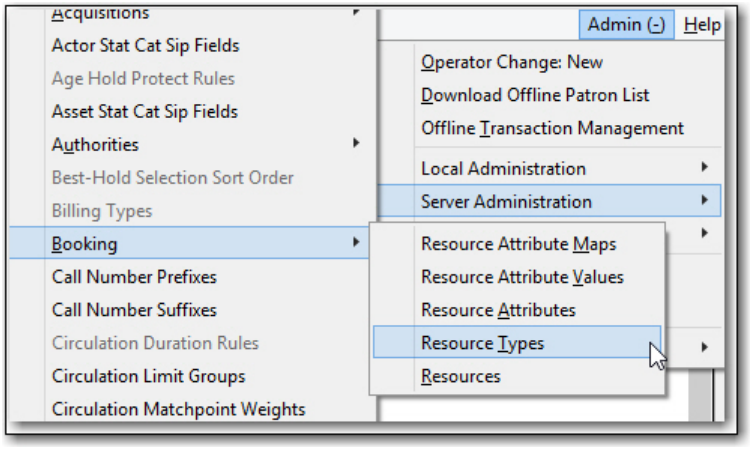
The following pieces make up a non-bibliographic resource:

- Resource Type
- Resource Attribute
- Resource Attribute Values
- Resource
- Resource Attribute Map

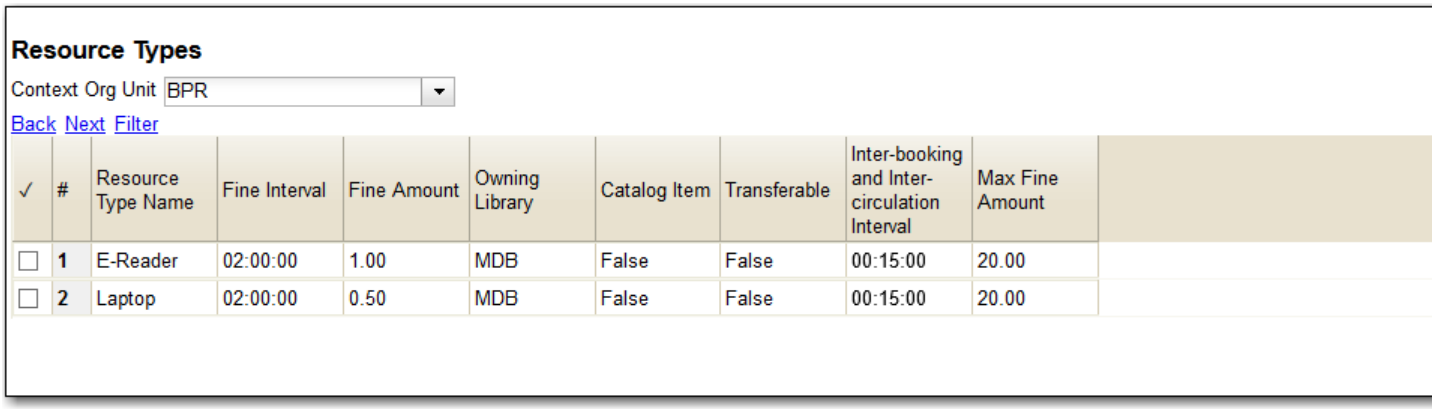
You need to create resource types and resource attributes (features of the resource types), and add booking items (resources) to individual resource type. Each resource attribute may have multiple values. You need to link the applicable features (resource attributes and values) to individual item (resource) through the *Resource Attribute Map*. Before you create resources (booking items) you need to have a resource type and associated resource attributes and values, if any, for them.

Create New Resource Type

1. Select *Admin* → *Server Administration* → *Booking* → *Resource Types*.



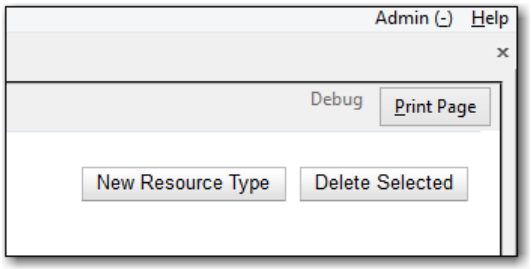
2. A list of current resource types will appear. Use *Back* and *Next* buttons to browse the whole list.



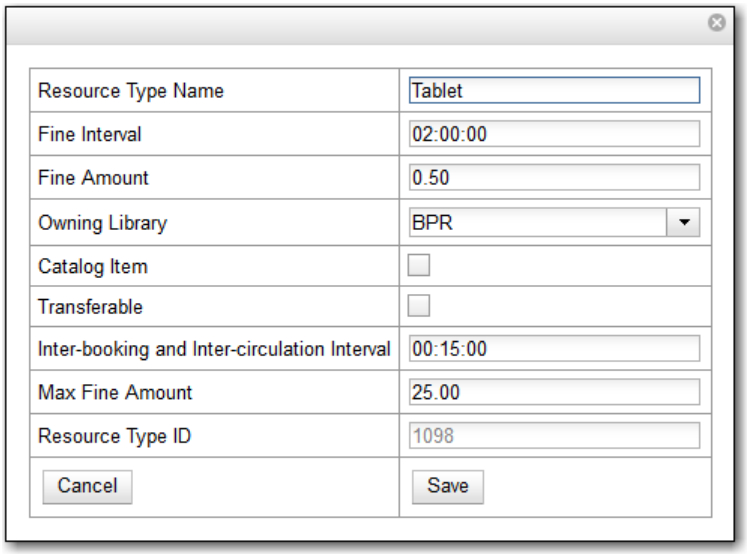
✓	#	Resource Type Name	Fine Interval	Fine Amount	Owning Library	Catalog Item	Transferable	Inter-booking and Inter-circulation Interval	Max Fine Amount
☐	1	E-Reader	02:00:00	1.00	MDB	False	False	00:15:00	20.00
☐	2	Laptop	02:00:00	0.50	MDB	False	False	00:15:00	20.00

You may also see cataloged items in the list. Those items have been marked bookable or booked before.

3. To create a new resource type, click *New Resource Type* in the top right corner, .



4. A box will appear in which you create your new type of resource.



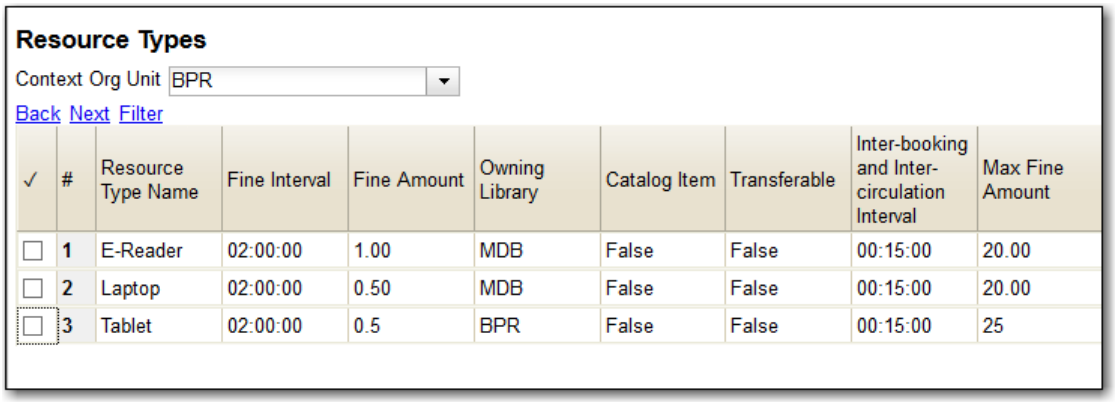
- *Resource Type Name* - Give your resource a name.
- *Fine Interval* - How often will fines be charged? This period can be input in several ways:

  - second(s), minute(s), hour(s), day(s), week(s), month(s), year(s)
  - sec(s), min(s)
  - s, m, h
  - 00:00:30, 00:01:00, 01:00:00

- *Fine Amount* - The amount that will be charged at each *Fine Interval*.
- *Owning Library* - The home library of the resource.
- *Catalog Item* - (Function not currently available.)
- *Transferable* - This allows the item to be transferred between libraries.
- *Inter-booking and Inter-circulation Interval* - The amount of time required by your library between the return of a resource and a new reservation for the resource. This interval uses the same input conventions as the *Fine Interval*.
- *Max Fine Amount* - The amount at which fines will stop generating.

5. Click *Save* when you have entered the needed information.

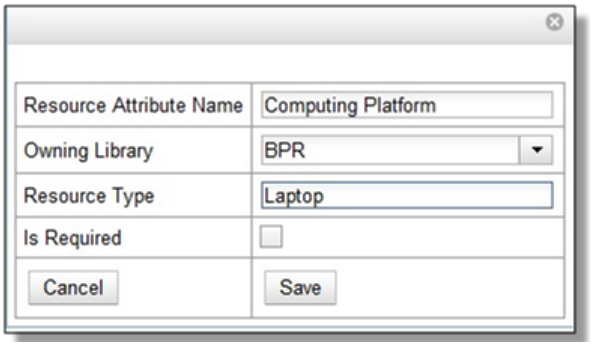
6. The new resource type will appear in the list.



✓	#	Resource Type Name	Fine Interval	Fine Amount	Owning Library	Catalog Item	Transferable	Inter-booking and Inter-circulation Interval	Max Fine Amount
☐	1	E-Reader	02:00:00	1.00	MDB	False	False	00:15:00	20.00
☐	2	Laptop	02:00:00	0.50	MDB	False	False	00:15:00	20.00
☐	3	Tablet	02:00:00	0.5	BPR	False	False	00:15:00	25

Create New Resource Attribute

1. Select *Server Administration* → *Booking* → *Resource Attributes*.
2. Click *New Resource Attribute* in the top right corner.
3. A box will appear in which you can add the attributes of the resource. Attributes are categories of descriptive information that are provided to the staff member when the booking request is made. For example, an attribute of a projector may be the type of projector. Other attributes might be the number of seats available in a room, or the computing platform of a laptop.



- *Resource Attribute Name* - Give your attribute a name.
- *Owning Library* - The home library of the resource.
- *Resource Type* - Type in the first letter to list then choose the *Resource Type* to which the Attribute is applicable.
- *Is Required* - (Function not currently available.)

4. Click *Save* when the necessary information has been entered.
5. The added attribute will appear in the list.

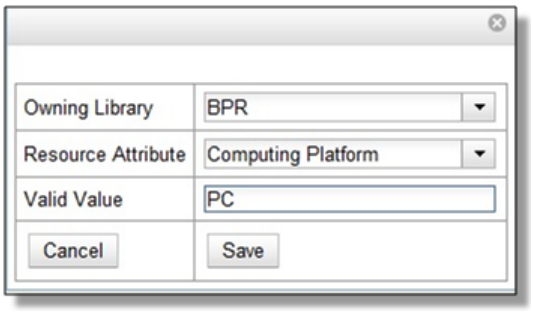
One resource type may have multiple attributes. You may repeat the above procedure to add more.

Create New Resource Attribute Value

1. One resource attribute may have multiple values. To add new attribute value, select *Server Administration* → *Booking* → *Resource Attribute Values*.

2. Click *New Resource Attribute Value* in the top right corner.

3. A box will appear in which you assign a value to a particular attribute. Values can be numbers, words, or a combination of them, that describe the particular aspects of the resource that have been defined as Attributes. As all values appear on the same list for selection, values should be as unique as possible. For example, a laptop may have a computing platform that is either PC or Mac.



   - *Owning Library* - The home library of the resource.
   - *Resource Attribute* - The attribute you wish to assign the value to.
   - *Valid Value* - Enter the value for your attribute.

4. Click *Save* when the required information has been added.

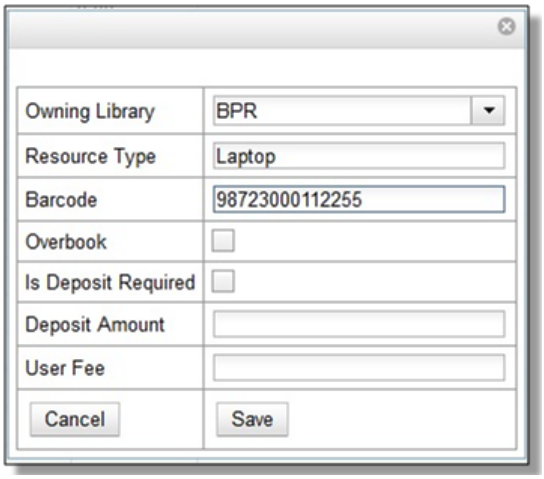
5. The attribute value will appear in the list. Each attribute should have at least two values attached to it; repeat this process for all applicable attribute values.

Create New Resource

1. Add items to a resource type. Click *Admin* → *Server Administration* → *Booking* → *Resources*.

2. Click *New Resource* in the top right corner.

3. A box will appear. Add information for the resource.



- *Owning Library* - The home library of the resource.
- *Resource Type* - Type in the first letter of the resource type's name to list then select the resource type for your item.
- *Barcode* - Barcode for the resource.
- *Overbook* - This allows a single item to be reserved, picked up, and returned by multiple patrons during overlapping or identical time periods.
- *Is Deposit Required* - (Function not currently available.)
- *Deposit Amount* - (Function not currently available.)
- *User Fee* - (Function not currently available.)

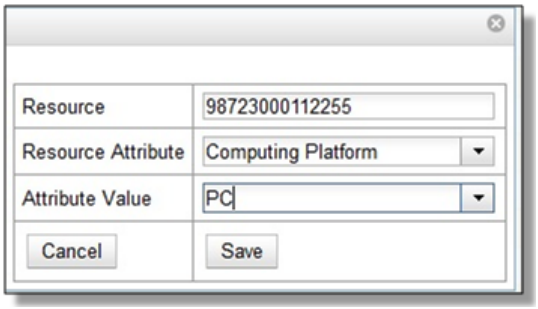
4. Click *Save* when the required information has been added.
5. The resource will appear in the list.

One resource type may have multiple resources attached.

Map Resource Attributes and Values to Resources

1. Use *Resource Attribute Maps* to bring together the resources and their attributes and values. Select *Admin* → *Server Administration* → *Booking* → *Resource Attribute Maps*.
2. Click *New Resource Attribute Map* in the right top corner.

3. A box will appear in which you will map your attributes and values to your resources.



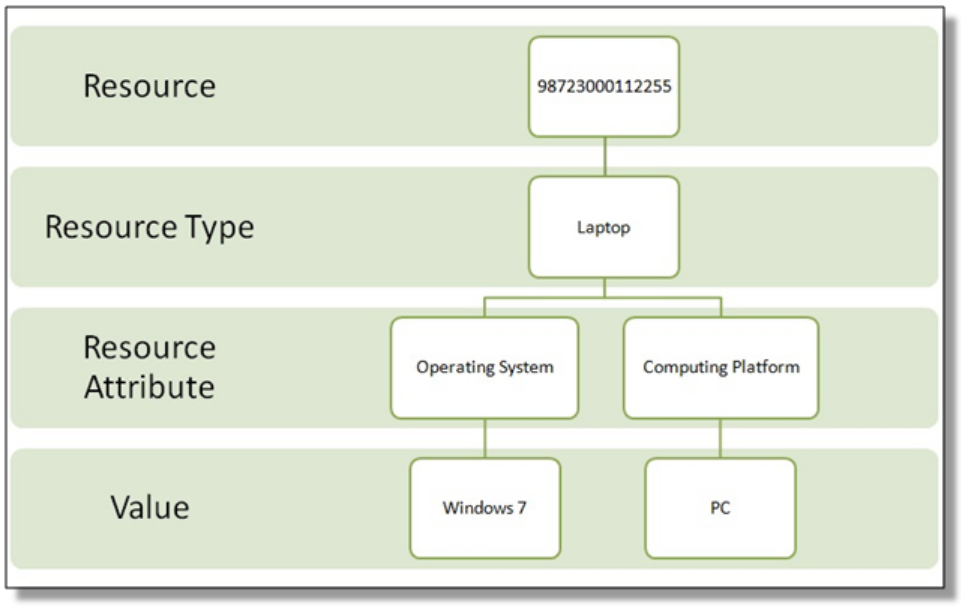
- *Resource* - Enter the barcode of your resource.
- *Resource Attribute* - Select an attribute that belongs to the Resource Type.
- *Attribute Value* - Select a value that belongs to your chosen attribute and describes your resource. If your attribute and value do not belong together you will be unable to save.

4. Click *Save* once you have entered the required information.

> A resource may have multiple attributes and values. Repeat the above steps to map all.

5. The resource attribute map will appear in the list.

Once all attributes have been mapped your resource will be part of a hierarchy similar to the example below.



46.3. Editing Non-Bibliographic Resources

Staff with the required permissions can edit aspects of existing non-bibliographic resources. For example, resource type can be edited in the event that the fine amount for a laptop changes from $2.00 to $5.00.

Editing Resource Types

1. Bring up your list of resource types. Select *Admin* → *Server Administration* → *Booking* → *Resource Types*.
2. A list of current resource types will appear.
3. Double click anywhere on the line of the resource type you would like to edit.
4. The resource type box will appear. Make your changes and click *Save*.

Following the same procedure you may edit Resource Attributes, Attributes Values, Resources and Attribute Map by selecting them on *Admin* → *Server Administration* → *Booking* menu.

46.4. Deleting Non-bibliographic Resources

1. To delete a booking resource, go to *Admin* → *Server Administration* → *Booking* → *Resources*.
2. Select the checkbox in front the resource you want to delete. Click *Delete Selected*. The resource will disappear from the list.

Following the same procedure you may delete Resource Attributes Maps.

You may also delete Resource Attribute Values, Resource Attributes and Resource Types. But you have to delete them in the reverse order when you create them to make sure the entry is not in use when you try to delete it.

This is the deletion order: Resource Attribute Map/Resources -> Resource Attribute Values -> Resource Attributes -> Resource Types.

Part VIII. Inventory

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Chapter 47. Sitka's Inventory Procedure

Inventory Module is part of Evergreen's long term development plan. At the moment there is no dedicated inventory function. The following procedure was developed by the Sitka Team based on the current available resources and the experience of inventory projects done by some Sitka libraries.

Evergreen has a feature that when an item is checked in/out or edited, a timestamp is captured in the Last Edit Date field in item record. Sitka Team's proposed inventory procedure is based on this feature, together with item status reports, which can be generated on the Report Interface from Sitka standard templates.

The procedure starts from libraries' checking in (timestamping) every item in the library. Then reports can be generated to list all items that have "in-library" status but do not have a timestamp within the time range when items were scanned. This will be the search list.

47.1. Checking in all items in the library

You need to freeze circulation of items in a small area (a shelf, a row of shelves, or one item type, etc.) before you start checking in the items on shelf. Depending on the devices you use you may choose one of the following methods to do the check-in:

Method 1: Checking in items on a laptop with Evergreen Staff Client installed and Internet access

- On *Check In (F2)* screen scan every item on shelf in the frozen area.

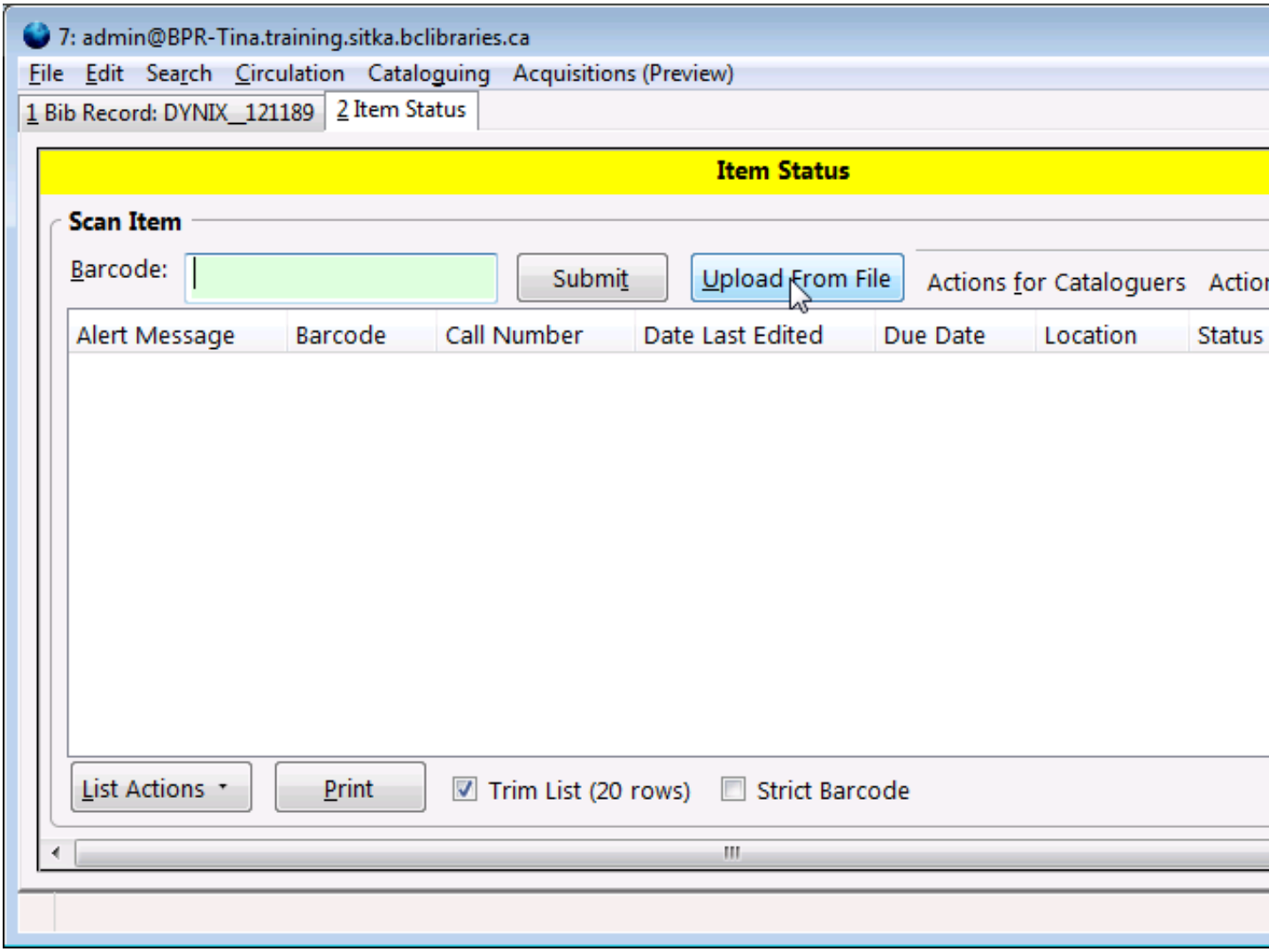
Methhod 2: Checking in items with a portable barcode scanner

1. Scan every item barcode on shelf in the frozen area.

2. Export the barcodes to a text file (Sitka team recommends using *Notepad*.) to a computer with Evergreen installed. The barcodes should be in one single spaced single column without extra space anywhere.

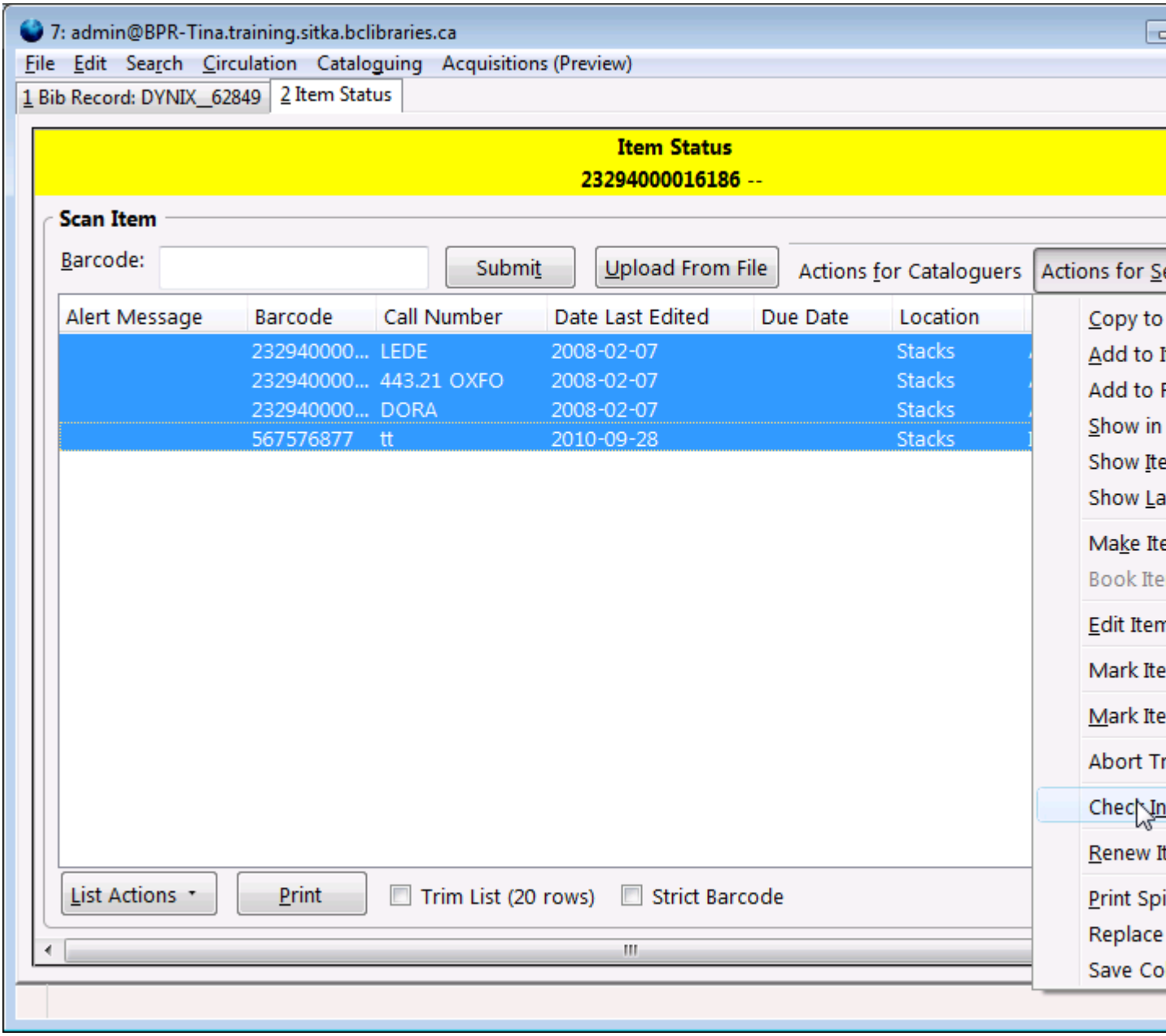
3. Use *Cut* and *Paste* functions to break the big list of barcodes into smaller lists and save each list as an individual text file (suggest each list contains about 50 barcodes). Name your files in sequence, e.g. inventory001, inventory002..., so that it will be easy to follow when you upload the files.

4. On *Item Status (F5)* screen of *Evergreen*, click *Upload From File*.



5. You are prompted to browse your local computer to find the barcode files. Navigate to and select your first file and click *Open*.

6. Every item on the list is retrieved and displayed. It may take a while if the list is long. Select all items by using *Shift* key together with mouse. Click *Actions for Selected Items* → *Check in Items*.



7. Repeat steps 4-6 to check in items in all files.

You may see prompt popups for items with special status, such as lost, missing, checked out, in-transit or routing to the holds shelf. Once you confirm the prompt, the loading will continue. But you need to follow up with items going on hold shelf and in-transit. .

Method 3: Checking in items on a laptop using a text processing program

1. Open a text processing program on your laptop (Sitka team recommends using *Notepad*) and scan about 50 items on shelf. Save your file with .txt extension. The barcodes should be in a single column without any extra space anywhere.

2. Start a new empty file and continue scanning about 50 items and save the file. Name your files in sequence, e.g. inventory1, inventory2, ... Repeat this step until all items are scanned in the frozen area.

3. On *Item Status (F5)* screen of *Evergreen*, use the *Upload From Files* function to check in all items in all text files. See steps 4-6 in Method 2.

47.2. Generating reports and search list

There are two templates in *SITKA_templates* > *Inventory* folder on the *Report Interface*. *Inventory - scanned items by shelving location* counts items that have Last Edited Date after a specified date, which could be the date when you started taking inventory. The numbers are broken down by shelving locations. This is the report that counts the items that have been checked in/out or otherwise edited (including marking missing or lost) during the inventory period.

Inventory - un-scanned items lists items having Last Edit Date before a specified date, in specified shelving locations and having specified status. By using the date when you started taking inventory, the shelving location(s) in which you took inventory and the "on shelf" status, such as Reshelving, Available, On Hold Shelf, etc. for these specified values, the output of this report is the search list. Items on this list should be on shelf but they were not checked in or out during the inventory process.

You may use Sitka's standard Missing and Lost items report to generate these lists.

For accuracy we would suggest staff not edit items without the physical copy at hand during inventory period. Eding an item will update Last Edited Date field.

Once inventory starts, any items found in inapporiate location should be checked in before they are put back to the right location.

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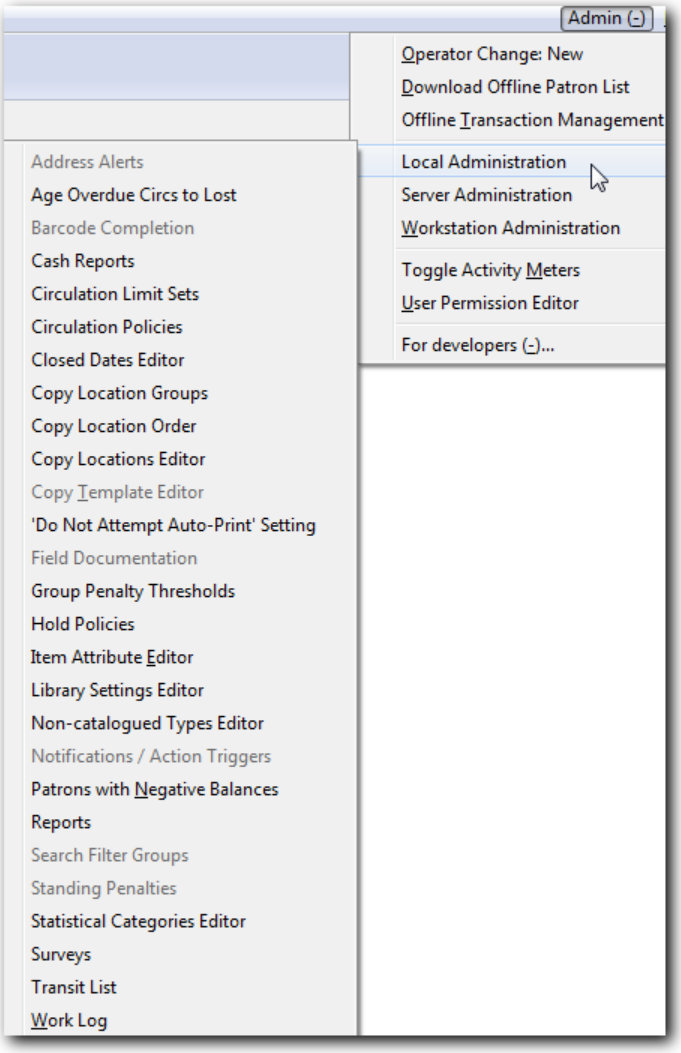
Chapter 48. Local Administration Menu

48.1. Overview

Many Evergreen configuration options are available under the *Admin* → *Local Administration* rollover menu.



Items on this menu are visible to anyone logged into the staff client but usually require special permissions to edit. The following table describes each of the menu options and their required permission levels. Contact the Sitka support team if you have questions about settings that cannot be edited with a Local System Administrator (LSA) account.

Menu option	Description	Permissions
Age Overdue Circs to Lost	To create a queue of ALL overdue items by selected patron profiles at selected libraries to be marked lost. It does not support date parameter. This feature is mainly for school libraries' end of term	LSA

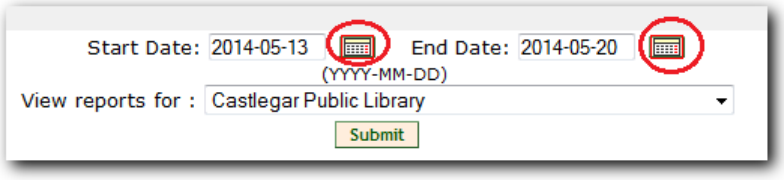
Menu option	Description	Permissions
	process. To automatically mark items lost when they are overdue for x days contact Sitka support.	
Cash Reports	View summary report of cash transactions for selected date range	All staff
Circulation Limit Set	View circulation limit on combination of circ modifier and patron profile	Viewable to LSA. Contact Sitka Support for editing
Circulation Policies	View circulation policies	Viewable to LSA. Contact Sitka Support for editing
Closed Dates Editor	Set library closure dates (affects due dates and fines)	LSA
Copy Locations Editor	Create and edit copy locations, also known as shelving locations	LSA
Copy Location Groups	Allows one or more shelving locations to be grouped together as a search location.	Sitka Support
Copy Location Order	Change display order of copy locations on Holds Pull list, also known as shelving locations	LSA
Copy Template Editor	Admin settings for Serials	LSA/Serials staff
'Do Not Attempt Auto-Print' Setting	Override default settings to block automatic receipt printing in selected staff client transactions; not yet documented	LSA
Field Documentation	Create custom notes describing individual staff client fields to library staff; currently applies only to the patron registration fields	Sitka support
Group Penalty Thresholds	Set library-specific thresholds for maximum items out, maximum overdues, and maximum fines	LSA
Hold Policies	View Hold Policies	LSA
Item Attribute Editor	Hide/unhide field(s) on *Edit Item Attributes* screen	LSA
Library Settings Editor	Detailed library configuration settings	LSA/Sitka supprt
Non-Catalogued Type Editor	Create and edit optional *non-catalogued* item types	LSA
Notifications / Action Triggers	Admin settings	Sitka support
Patrons with Negative Balances	Display a list of patron accounts with negative bill balances, to whom the library may owe refunds	All staff
Reports	Generate reports on any field in the Evergreen database	Staff with reporter permission (report output optionally visible to all staff)
Search Filter Groups	Not in use	Sitka support
Standing Penalties	*Admin settings*	Sitka support

Menu option	Description	Permissions
Statistical Categories Editor	Create and manage optional categories for detailed patron/item information	LSA
Surveys	Create patron surveys to be completed at patron registration	LSA
Transit List	View items in transit to or from your library during selected date range	All staff
Work Log	List the most recent transactions processed at the selected workstation	All staff

48.2. Cash Reports

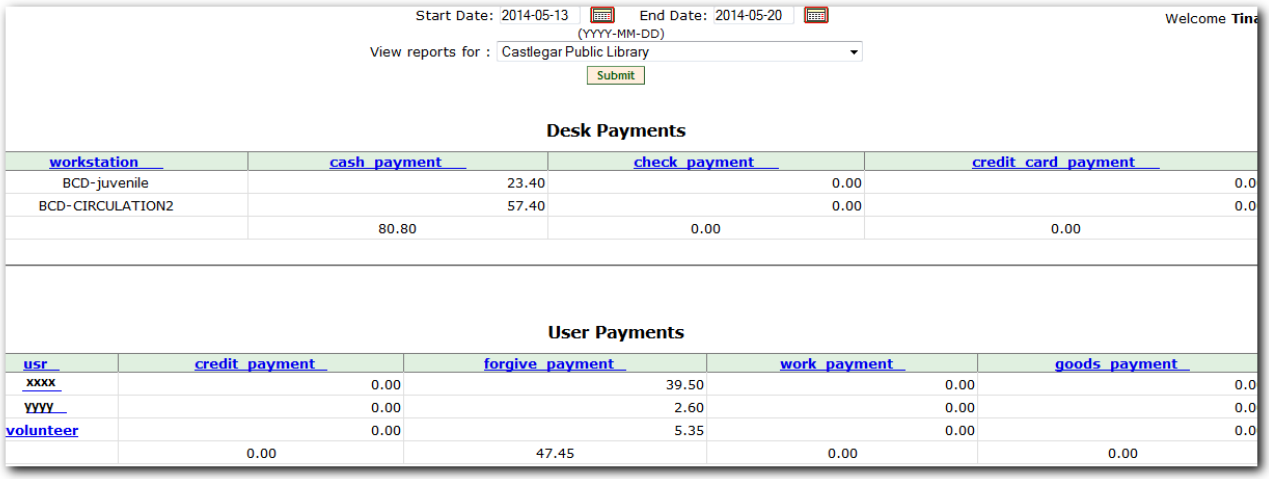
1. Select *Admin* → *Local Administration* → *Cash Reports*.

2. Select the start date and the end date that you wish to run a cash report for. You can either enter the date in the YYYY-MM-DD format, or click on the calendar icon to use the calendar widget.



3. Select your library from the drop down menu. Click *Submit*.

4. The output will show cash, check, and credit card payments. It will also show amounts for credits, forgiven payments, work payments and goods payments (e.g. food for fines initiatives, replacement copy for lost item, etc.). The output will look something like this:


Start Date: 2014-05-13
End Date: 2014-05-20
(YYYY-MM-DD)
Welcome Tina
View reports for : Castlegar Public Library
Submit
Desk Payments
workstation | cash_payment | check_payment | credit_card_payment
BCD-juvenile | 23.40 | 0.00 | 0.0
BCD-CIRCULATION2 | 57.40 | 0.00 | 0.0
80.80 | 0.00 | 0.00
User Payments
usr | credit_payment | forgive_payment | work_payment | goods_payment
xxxx | 0.00 | 39.50 | 0.00 | 0.0
yyyy | 0.00 | 2.60 | 0.00 | 0.0
volunteer | 0.00 | 5.35 | 0.00 | 0.0
0.00 | 47.45 | 0.00 | 0.00

By clicking on the hyperlinked column headers (i.e. *workstation*, *cash_payment*, *check_payment*, etc.) it is possible to sort the columns to order the payments from smallest to largest, or largest to smallest, or to group the workstation names.

Customized payment reports can be created from the reports interface. Several shared templates are available under *SITKA_templates* → *Payments*. For instructions on using shared templates see Chapter 32, *Shared Templates in SITKA_templates*

48.3. Circulation Policies

1. A user with LSA privileges can view your library's circulation policies. Changes to circulation policies can be requested through the Sitka support team.

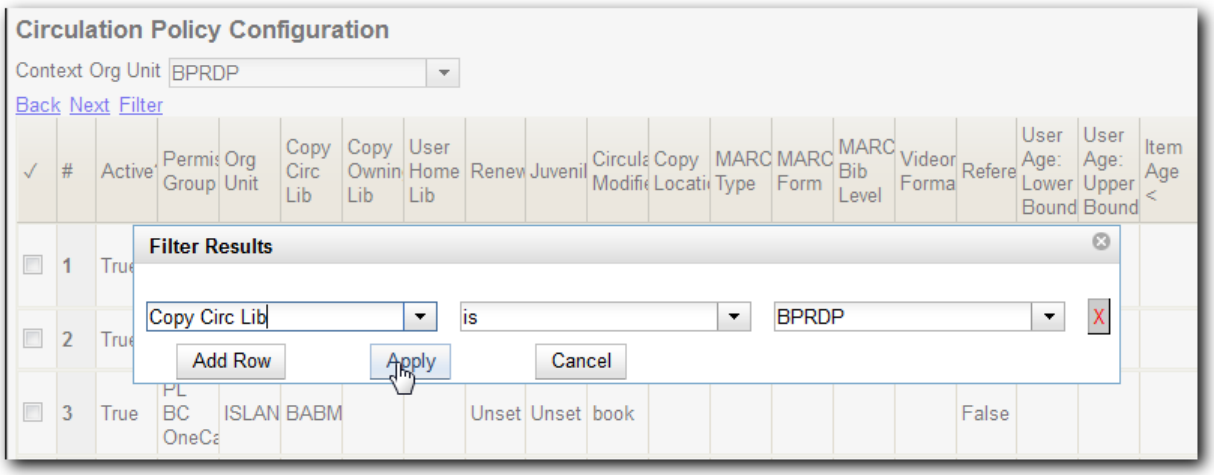
   Select *Admin* → *Local Administration* → *Circulation Policies*.

2. By default, your library is selected in the box after *Context Org Unit* (i.e. Checkout Library). The initial display will show all circulation rules at your library and the federation level. You can filter the display to show rules applied to just your library's items.

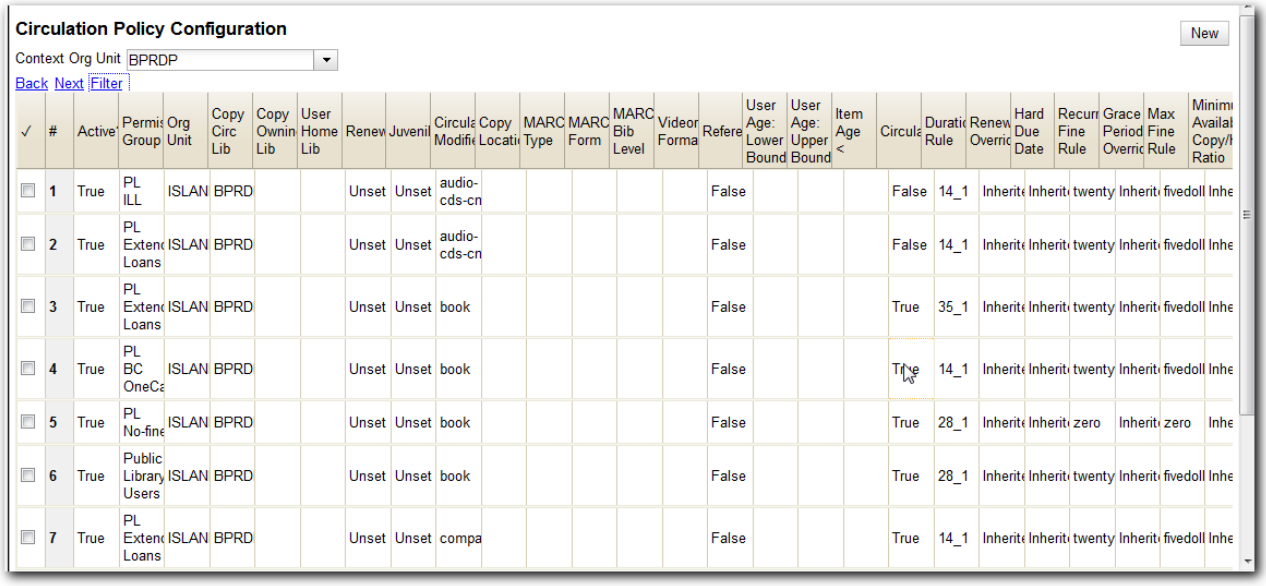
   Click *Filter* under *Context Org Unit*.

   In the popped up window, select *Copy Circ Lib* from the first dropdown list; *Is* from the second list and your library the third.

   Click *Apply* to limit display to just your library.



3. The resulting screen provides a summary view of each circulation rule for your library, and more detail can be seen by clicking on the individual entries.



✓	#	Active	Permis Group	Org Unit	Copy Circ Lib	Copy Ownin Lib	User Home Lib	Renew	Juveni	Circula Modifi	Copy Locati	MARC Type	MARC Form	MARC Bib Level	Videor Forma	Refere	User Age: Lower Bound	User Age: Upper Bound	Item Age <	Circula	Durati Rule	Renew Overric	Hard Due Date	Recurr Fine Rule	Grace Period Overric	Max Fine Rule	Minim Availal Copy/I Ratio
☐	1	True	PL ILL	ISLAN	BPRD			Unset	Unset	audio-cds-cn						False				False	14_1	Inherit	Inherit	twenty	Inherit	fivedoll	Inhe
☐	2	True	PL Exten Loans	ISLAN	BPRD			Unset	Unset	audio-cds-cn						False				False	14_1	Inherit	Inherit	twenty	Inherit	fivedoll	Inhe
☐	3	True	PL Exten Loans	ISLAN	BPRD			Unset	Unset	book						False				True	35_1	Inherit	Inherit	twenty	Inherit	fivedoll	Inhe
☐	4	True	PL BC OneCa	ISLAN	BPRD			Unset	Unset	book						False				True	14_1	Inherit	Inherit	twenty	Inherit	fivedoll	Inhe
☐	5	True	PL No-fine	ISLAN	BPRD			Unset	Unset	book						False				True	28_1	Inherit	Inherit	zero	Inherit	zero	Inhe
☐	6	True	Public Library Users	ISLAN	BPRD			Unset	Unset	book						False				True	28_1	Inherit	Inherit	twenty	Inherit	fivedoll	Inhe
☐	7	True	PL Exten Loans	ISLAN	BPRD			Unset	Unset	compa						False				True	14_1	Inherit	Inherit	twenty	Inherit	fivedoll	Inhe

Circulation policies define the loan duration, renewals, recurring fine rate, maximum fine amount, grace period and maximum items out rules for different combinations of User Permission Groups and Home Library, and Circ Modifiers for items belonging to one library or library system. Other item attributes may be used for more specific rules. Please contact Sitka support.

The current circulation polices allow items to be checked out and renewed at any library in your library federation.

4. Select the individual circulation policy for viewing by double-clicking on the desired row.

48.4. Closed Dates Editor

These dates are in addition to your regular weekly closed days (see Section 49.1.1, “Library Hours of Operation”).
Both regular closed days and those entered in the *Closed Dates Editor* affect due dates, fines, and targeting for holds:

- **Due dates.** Due dates that would fall on closed days are automatically pushed forward to the next open day. Likewise, if an item is checked out at 8pm, for example, and would normally be due on a day when the library closes before 8pm, Evergreen pushes the due date forward to the next open day.

- **Overdue fines.** Overdue fines are not charged on days when the library is closed, unless your library chooses to charge via *Library Settings Editor: Charge fines on overdue circulations when closed.*

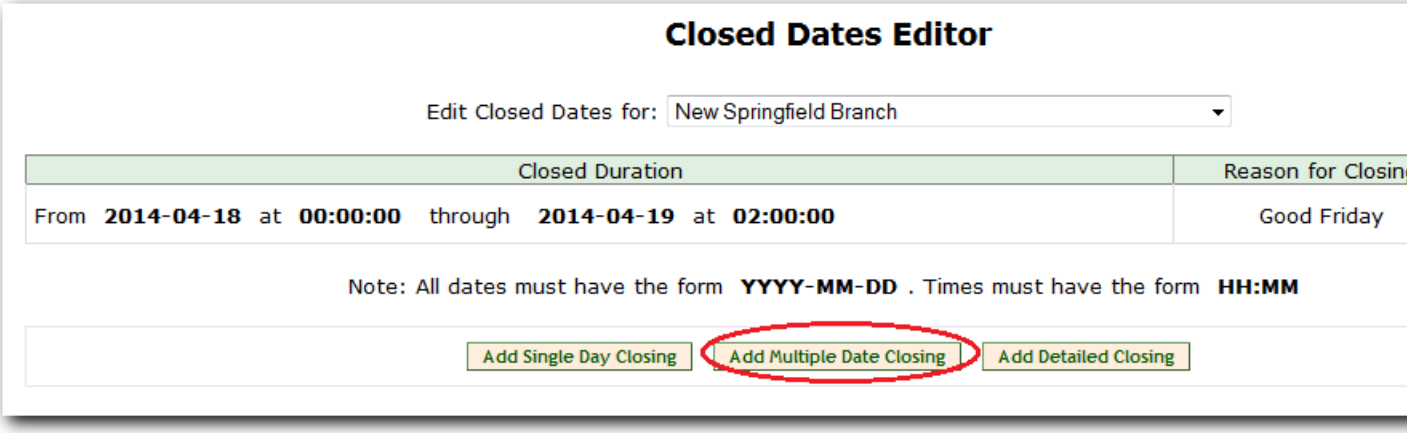
- **Hold Targeting.** By default items at a closed library are not targeted for holds. This means that available items that patrons have placed holds on will not appear on the Holds Pull List until the next open day. If you wish items to be targeted when the library is closed to the public, perhaps staff are still working and would like to pull items for holds, you can use the library settings *Target copies for a hold even if copy's circ lib is closed* and *Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup lib* to override the default behaviour.

Sitka libraries not in the Pacific time zone must off-set their closed dates to ensure correct behaviour. See the Non-Pacific Time Zone section below for details.

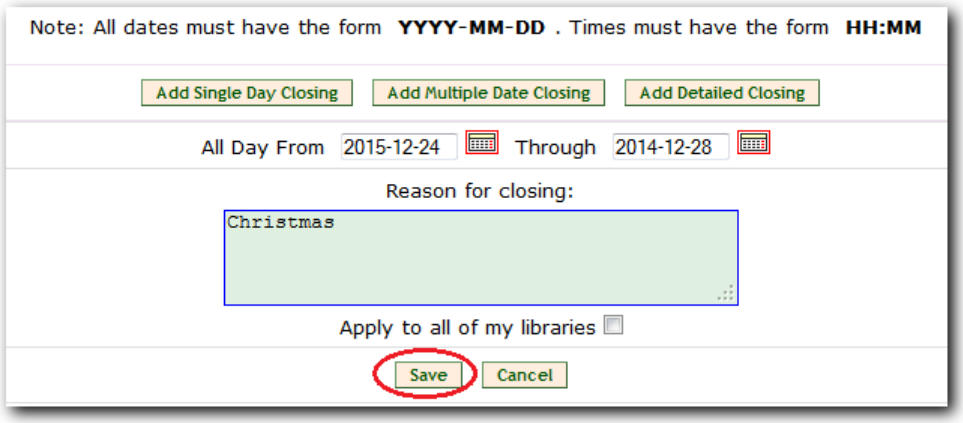
Multi-Day Closing

1. Select *Admin* → *Local Administration* → *Closed Dates Editor*.

2. Select *Add Multi-Date Closing* if your closed dates are entire business days.


Closed Dates Editor
Edit Closed Dates for:
New Springfield Branch
Closed Duration
Reason for Closin
From 2014-04-18 at 00:00:00 through 2014-04-19 at 02:00:00
Good Friday
Note: All dates must have the form YYYY-MM-DD . Times must have the form HH:MM
Add Single Day Closing
Add Multiple Date Closing
Add Detailed Closing

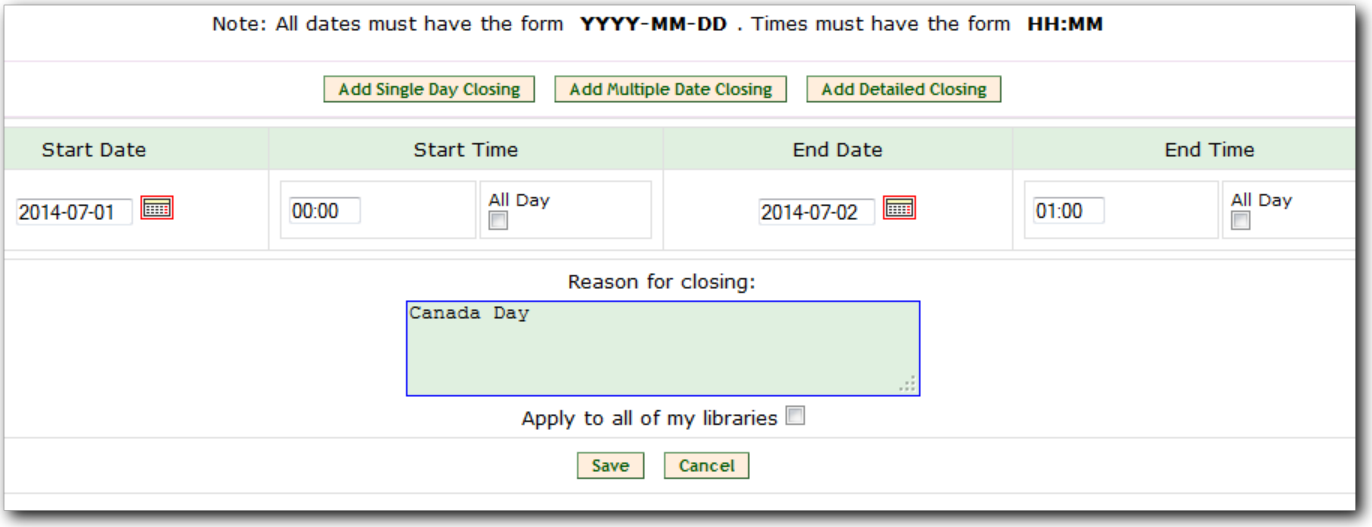
3. Enter applicable dates and a descriptive reason for the closing and click *Save*. Check the *Apply to all of my libraries* box if your library is a multi-branch system and the closing applies to all of your branches.


Note: All dates must have the form YYYY-MM-DD . Times must have the form HH:MM
Add Single Day Closing
Add Multiple Date Closing
Add Detailed Closing
All Day From 2015-12-24
Through 2014-12-28
Reason for closing:
Christmas
Apply to all of my libraries
Save
Cancel

You can type dates into fields using YYYY-MM-DD format or use calendar widgets to choose dates.

Detailed Closing

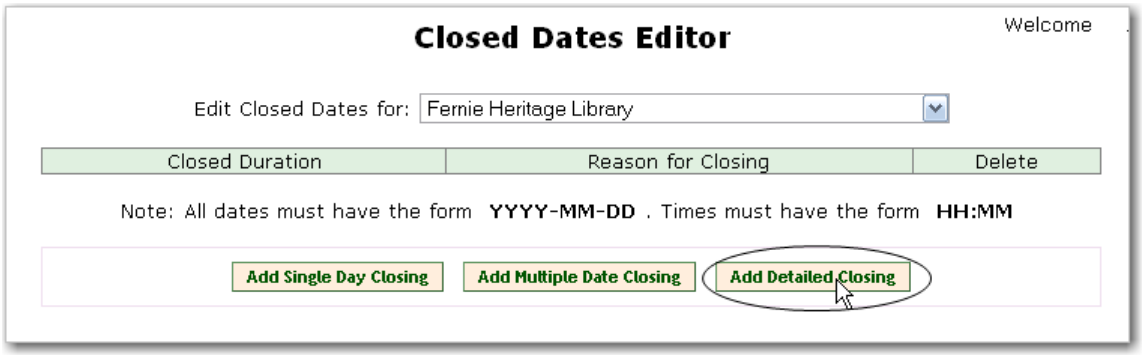
If your closed dates include a portion of a business day, select Add Detailed Closing at Step 2, then enter detailed hours and dates and click *Save*. Time format must be HH:MM.



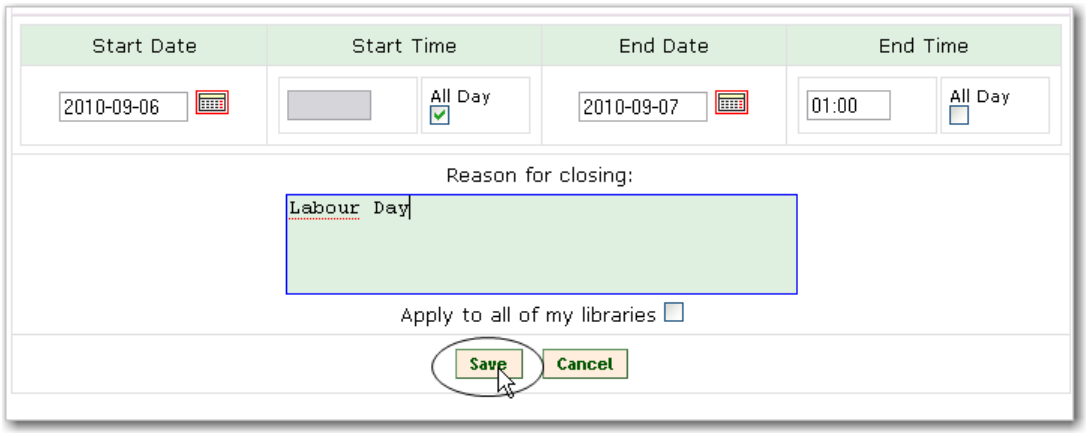
Libraries in Non-Pacific Time Zone

Sitka's Evergreen server is in the Pacific time zone. To ensure correct closed date behaviour Sitka libraries not in the Pacific time zone must off-set their closed date entries by using *Add Detailed Closing* for all closures.

1. Select *Add Detailed Closing*.


Closed Dates Editor
Welcome
Edit Closed Dates for: Fernie Heritage Library
Closed Duration
Reason for Closing
Delete
Note: All dates must have the form YYYY-MM-DD . Times must have the form HH:MM
Add Single Day Closing
Add Multiple Date Closing
Add Detailed Closing

2. Enter start date and select *All Day* under start time. To compensate for the time zone difference, the end date/time should be 1am for libaries in the Mountain Time Zone or 2am for libraries in the Central Time Zone the day **after** the closure. The example below is for a one day closure on September 6, 2010 for a library in the Mountain Time Zone. Click *Save* when finished.



48.5. Copy Locations Editor

1. Select *Admin* → *Local Administration* → *Copy Locations Editor*.

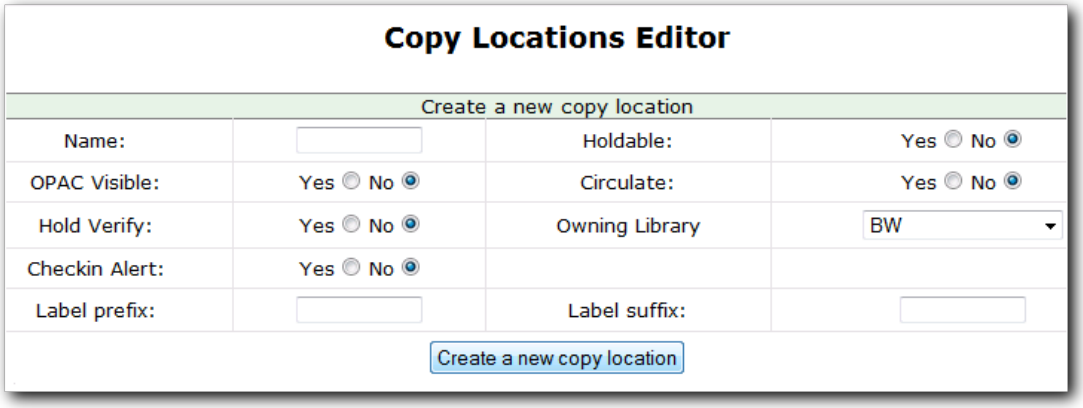
2. You can create new copy locations (aka shelving location), or edit existing copy locations. To create a new shelving location, type in the name, and select *Yes* or *No* for the various attributes: *OPAC Visible*, *Holdable*, *Circulate*, *Hold Verify* and *Checkin Alert*. Click *Create a new copy location*.

   Holdable means a patron is able to place a hold on an item in this location.

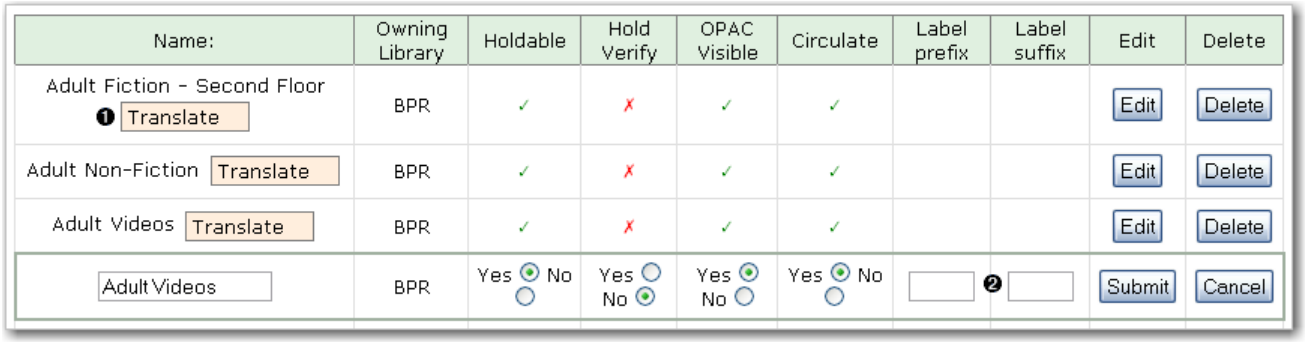
   Hold Verify, if set up, will generate a prompt when an item is captured for a hold.

   Checkin Alert will prompt staff to route the item to the location when checking in items with this location.

   Label Prefix and *Label Suffix*, if set up, will be automatically included when printing spine labels



3. In the bottom part of the *Copy Locations Editor* you can edit or delete existing copy locations. You cannot delete a location that contains items. In this example the copy location *Adult Videos* is being edited.



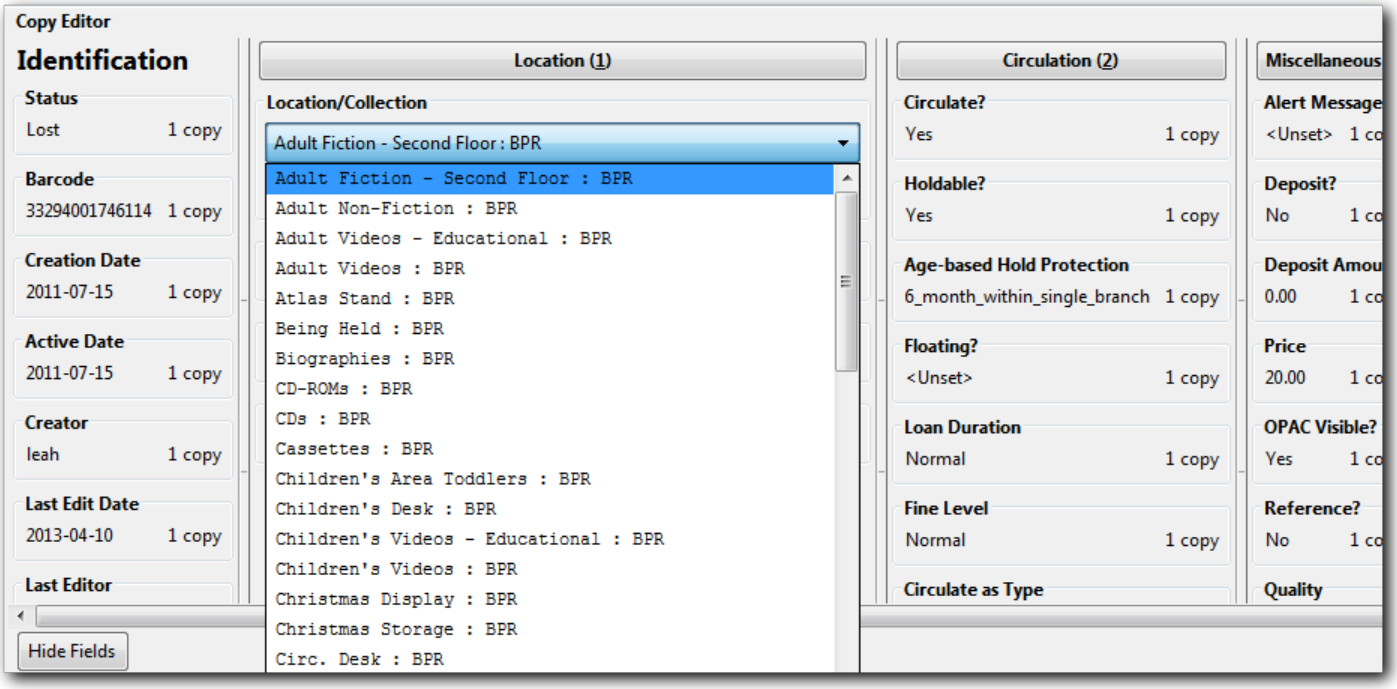
❶ Click *Translate* to enter optional translations of copy location titles for OPAC display when patrons select other languages.

❷ Text in the *Label prefix* and *Label suffix* fields will automatically be added to spine labels printed for items in the selected copy location. It does not affect OPAC or staff client display.

Whether an item can be circulated, holdable or visible on OPAC is controlled by three factors: item status, shelving location and item attributes (the options in the *Copy Editor*). Evergreen follows the aforementioned sequence to check the value of each factor until it encounters a NO. An item can be circulated, holdable or visible on OPAC when all three factors are set to YES.

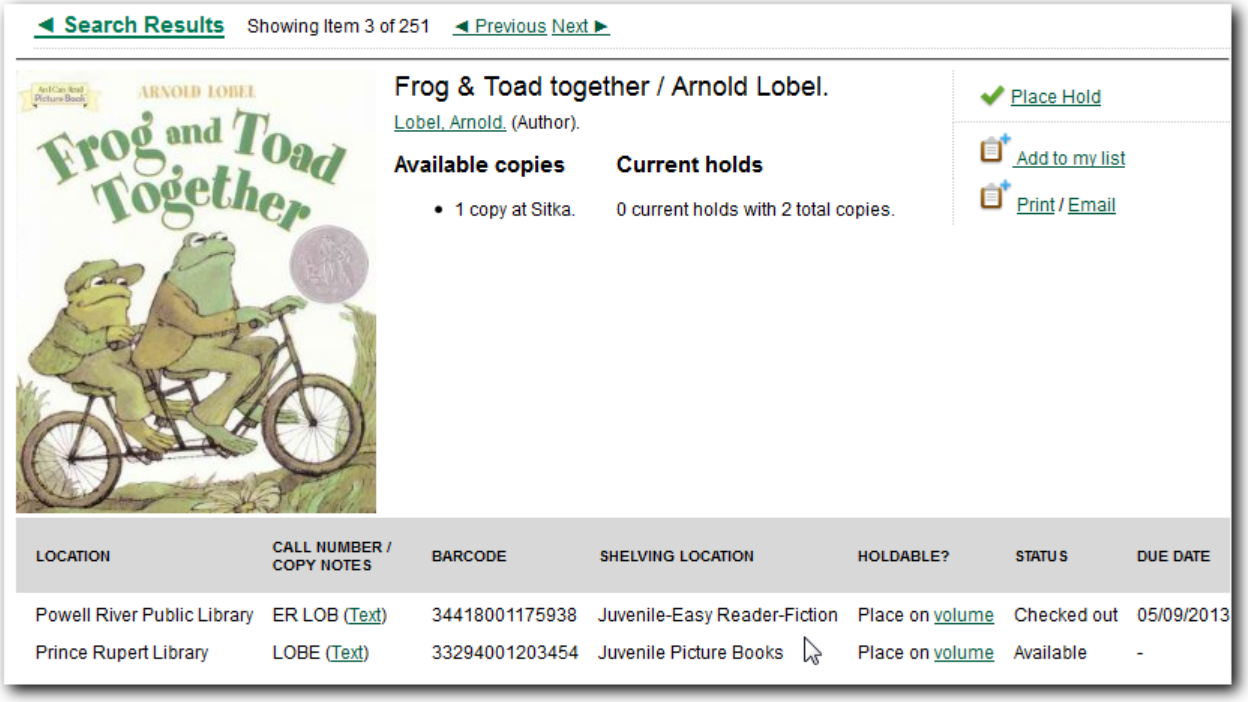
After creating or deleting a copy location, log out of the staff client and clear the cache to ensure changes are reflected in the copy editor. This is not required for edits to existing copy locations.

This is where you see the shelving locations in the *Copy Editor*:



The order of the shelving location name and library code can be reversed by setting up *Admin* → *Workstation Adminstration* → *Copy Editor: Copy Location Name First*

This is where the shelving location appears in the OPAC.



48.6. Copy Location Order

This is the place where you specifiy the copy location order on *Pull List of Hold Requests*. Items are grouped together by Copy Location first on the list to ease the process of tracing items on shelves. You may adjust the order according to the layout of your library's shelves.

Drag a Copy Location on the list to the proper position, then click *Apply Changes*.

48.7. Copy Template Editor

See Section 36.1, “Create a Copy Template” in Serials Adminsitration section.

48.8. 'Do Not Attempt-Auto-Print' Setting

This is the place where you select receipt/slip type(s) to disable auto-print attempt for it. No printing will be attempted if the receipt/slip type is selected. Auto-print button on individual function screen is automatically disabled for the selected receipts/slips. The optional receipts/slips are: Checkout, Bill Pay, Transit Slip, Hold Slip and Hold/Transit Slip.

Select/deselect one or more, then click *Update Setting*

For multi-branch libraries, you may use the dropdown list of libraries to make your selection effective to the selected branch or your whole library system.

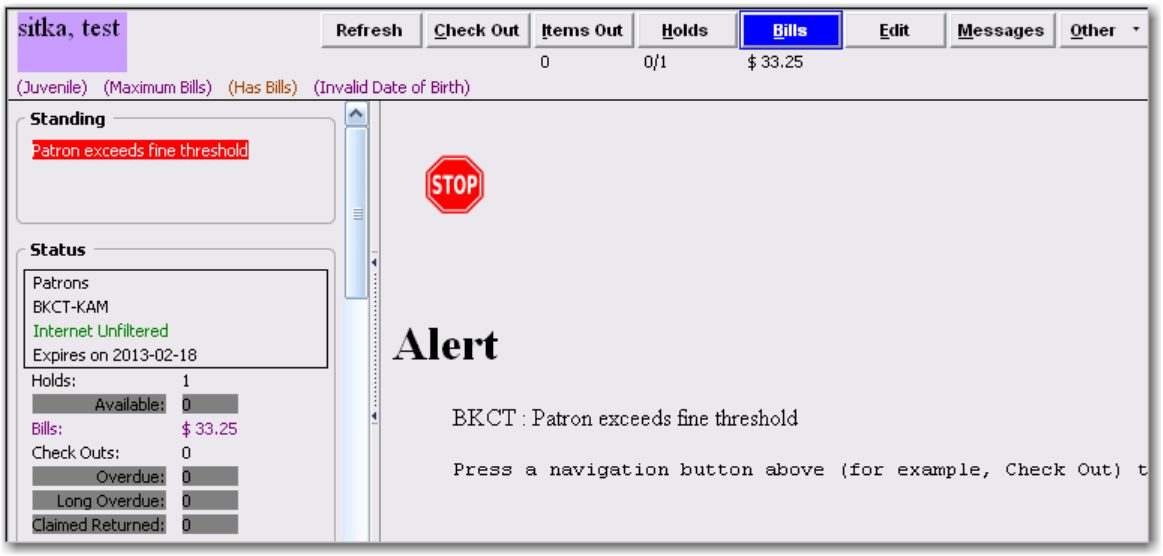
You may also remove receipt/slip type(s) from Library Settings Editor > Program: Disable Automatic Print Attempt Type List.

48.9. Group Penalty Thresholds

Group Penalty Thresholds block circulation transactions for users who exceed maximum check out limits, number of overdue items, or fines. Settings for your library are visible under *Admin* → *Local Administration* → *Group Penalty Thresholds*. There are four penalties in use now.

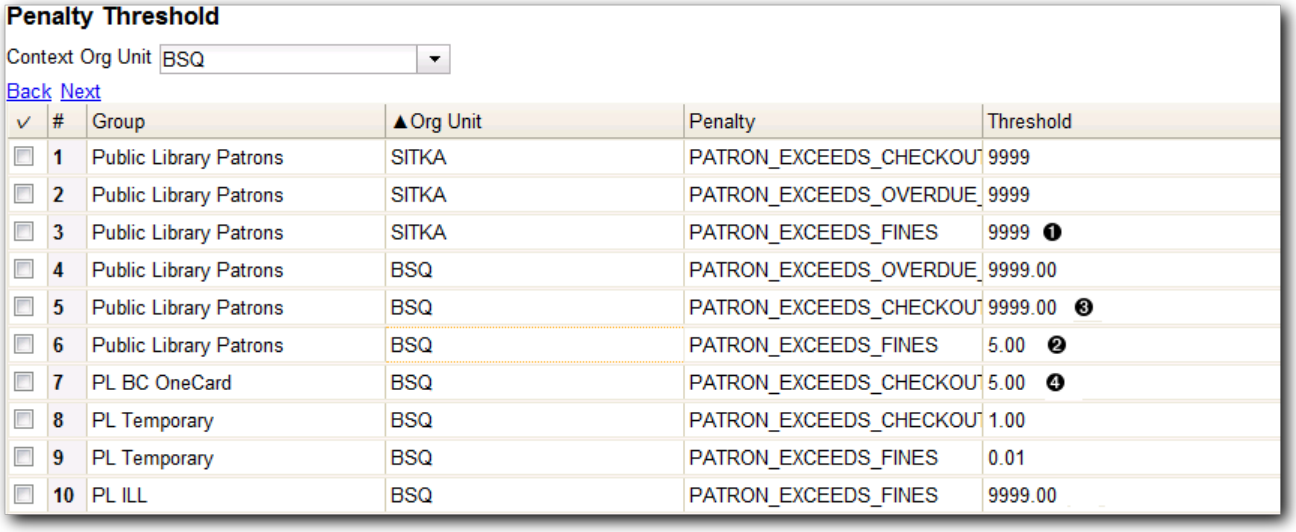
Penalty	Effect
PATRON_EXCEEDS_FINES	Blocks new circulations and renewals if patron exceeds X in fines
PATRON_EXCEEDS_OVERDUE_COUNT	Blocks new circulations if patron exceeds X overdue items
PATRON_EXCEEDS_CHECKOUT_COUNT	Blocks new circulations if patron exceeds X items out
PATRON_EXCEEDS_LOST_COUNT	Blocks new circulations if patron exceeds X lost items

Accounts that meet or exceed penalty thresholds display an alert message when opened and require staff overrides for blocked transactions.



48.9.1. Penalty threshold inheritance rules

Local penalty thresholds are identified by *Org Unit* and appear in the same table as the Sitka defaults.



✓	#	Group	▲Org Unit	Penalty	Threshold
☐	1	Public Library Patrons	SITKA	PATRON_EXCEEDS_CHECKOUT	9999
☐	2	Public Library Patrons	SITKA	PATRON_EXCEEDS_OVERDUE	9999
☐	3	Public Library Patrons	SITKA	PATRON_EXCEEDS_FINES	9999 ❶
☐	4	Public Library Patrons	BSQ	PATRON_EXCEEDS_OVERDUE	9999.00
☐	5	Public Library Patrons	BSQ	PATRON_EXCEEDS_CHECKOUT	9999.00 ❸
☐	6	Public Library Patrons	BSQ	PATRON_EXCEEDS_FINES	5.00 ❷
☐	7	PL BC OneCard	BSQ	PATRON_EXCEEDS_CHECKOUT	5.00 ❹
☐	8	PL Temporary	BSQ	PATRON_EXCEEDS_CHECKOUT	1.00
☐	9	PL Temporary	BSQ	PATRON_EXCEEDS_FINES	0.01
☐	10	PL ILL	BSQ	PATRON_EXCEEDS_FINES	9999.00

Where there is more than one threshold for the same penalty Evergreen gives precedence to local settings. In this example BSQ patrons are blocked when owing $5.00 in fines (❷) instead of the Sitka default of $9999.00 (❶).

Thresholds ❸ and ❹ are both for BSQ but apply to different user profile groups. Threshold ❸ limits all patrons to a maximum of 9999 items out, but ❹ provides an exception for the *PL BC OneCard* profile.

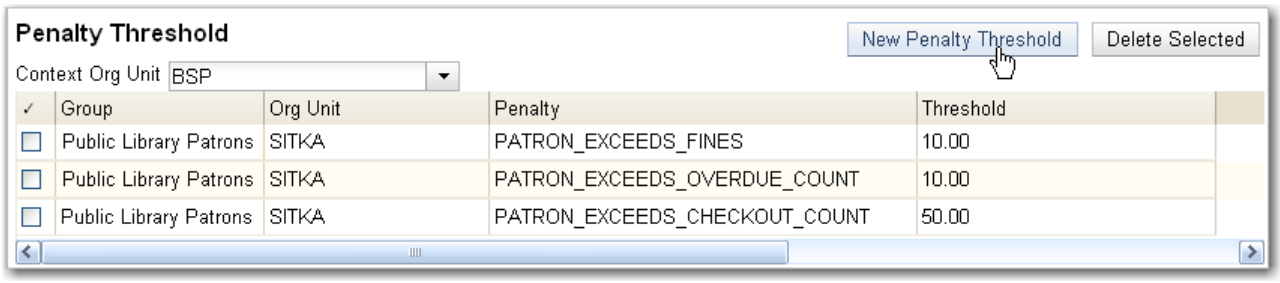
Multi-branch libraries may create rules for the entire library system or for individual branches. Evergreen will use the most specific applicable rule.

48.9.2. Creating local penalty thresholds

Local System Administrators can override the Sitka defaults by creating local penalty thresholds for selected patron groups.

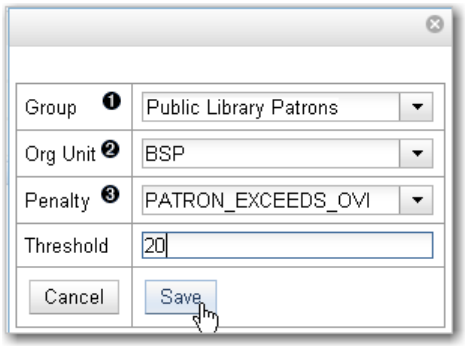
1. Select *Admin* → *Local Administration* → *Group Penalty Thresholds*.

2. Click *New Penalty Threshold*.



✓	Group	Org Unit	Penalty	Threshold
☐	Public Library Patrons	SITKA	PATRON_EXCEEDS_FINES	10.00
☐	Public Library Patrons	SITKA	PATRON_EXCEEDS_OVERDUE_COUNT	10.00
☐	Public Library Patrons	SITKA	PATRON_EXCEEDS_CHECKOUT_COUNT	50.00

3. The new penalty pop-up appears. Complete all fields and click *Save*.

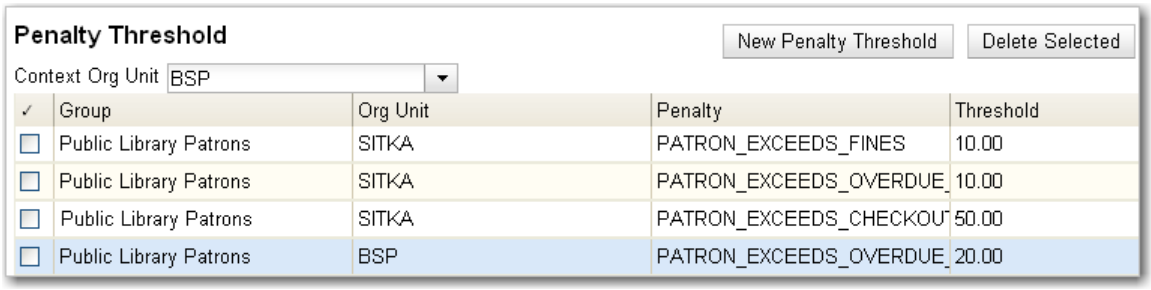


❶ *Group* - the profile group to which the rule applies. Selecting *Public Library Patrons* includes all profiles below it in the user hierarchy (PL BC OneCard, PL ILL, etc).

❷ *Org Unit* - multi-branch libraries may create rules for individual branches or the entire library system.

❸ *Penalty* - select *PATRON_EXCEEDS_CHECKOUT_COUNT*, *PATRON_EXCEEDS_LOST_COUNT*, *PATRON_EXCEEDS_OVERDUE_COUNT*, or *PATRON_EXCEEDS_FINES* ; other options are not used by Sitka.

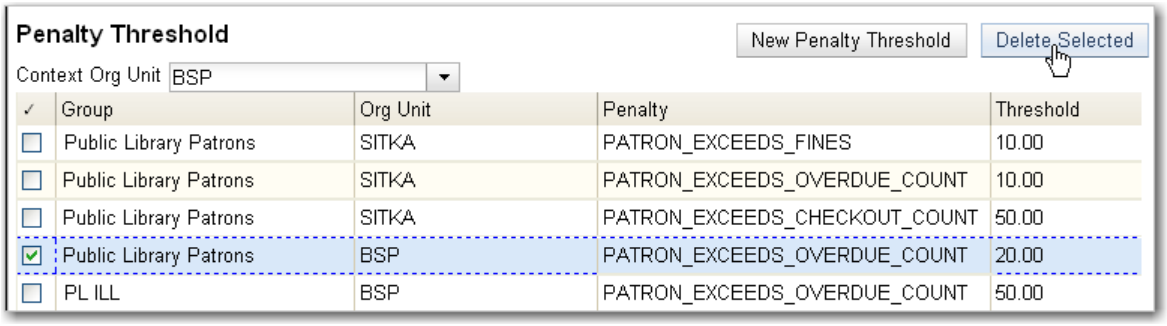
4. After clicking *Save* the new threshold appears with the Sitka defaults. Evergreen always gives precedence to local settings (in this example, BSP).


Penalty Threshold
New Penalty Threshold
Delete Selected
Context Org Unit BSP
✓ Group Org Unit Penalty Threshold
Public Library Patrons SITKA PATRON_EXCEEDS_FINES 10.00
Public Library Patrons SITKA PATRON_EXCEEDS_OVERDUE_ 10.00
Public Library Patrons SITKA PATRON_EXCEEDS_CHECKOU 50.00
Public Library Patrons BSP PATRON_EXCEEDS_OVERDUE_ 20.00

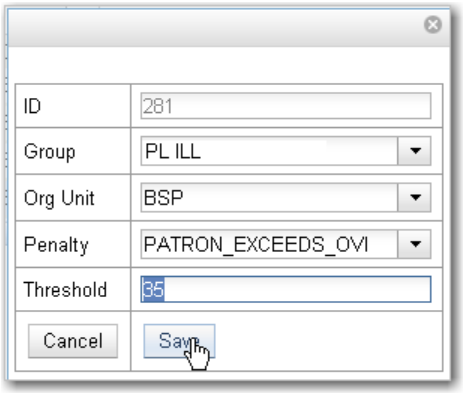
For user groups that have no limits Sitka Support recommends setting thresholds to 9999.

48.9.3. Deleting or editing local penalty thresholds

To delete a local threshold select the row to remove and click *Delete Selected*. The threshold is removed immediately without further confirmation.



To edit a local threshold, double-click the desired row to open the pop-up form. Edit the form and click *Save*. New settings take effect immediately.



48.10. Hold-driven Recall

Academic libraries usually allow extended loan periods to some patron types on some materials. They will recall these items when other patrons request them. Hold-driven Recall automates this process.

When libraries recall an item they ususally shorten the loan period and block renewal. They may also change the fine rate and maximum fine amount. A notice (via email) is sent to the current borrower to inform him/her of the change.

Evergreen uses three library setting entries to trigger hold-driven recall and define change parameters. When a hold is placed and there is no availabe copy, Evergeen will check whether the Recall settings are set up for the library. If settings are on and recall condition is met, a recall will be triggered.

Go to *Admin* → *Local Administration* → *Library Settings Editor* to set them up.

1. Recalls: Circulation duration that triggers a recall

   This is the threshold that decides whether a recall is triggered. Recalls are triggered only when items are checked out with a loan period longer than the one specified in this entry. For example, in a library the longest general loan period is 35 days. Extended loan to faculty is 92 days. You may specify, e.g. 36 days or 90 days in this

entry to trigger recalls on items checked out to faculty with extended loan period. But you need to consider the next entry to make your decision.

Evergreen uses the loan duration rule in circulation records as the loan period of a circulation. It does not calculate the loan period from the checkout and due dates. If you set specific due date on checkout, the actual loan period and the loan duration rule may not match.

2. Recalls: Truncated loan period

   When a recall is triggered, Evergreen will reset the due date in the current circulation record. The new due date is calculated based on the value entered in this entry and the above. The later date generated by these two entries will be the new due date. For example, the truncated loan period is 7 days and the threshold in the above entry is 36 days. On 2013-07-01 a recall is triggered on an item checked out on 2013-06-09, and the new due date based on truncated loan period will be 2013-07-08 (2013-07-01 + 7 days), while 2013-07-15 is based on the recall threshold (2013-06-09 + 36 days). Evergreen will set the new due date to 2013-07-15. If the above item is recalled on 2013-07-10, the due date from the truncated loan period will be 2013-07-17. This will be the new due date. In other words, the recall threshold is the minimum loan period an extended loan can be shortened to, and patrons with extended loan items will have at least the truncated loan period when they receive the recall notice.

Under extreme circumstance, overdue items' loan periods may be extended, e.g. an extended loan checked out in last term is recalled in this term.

3. Recalls: An array of fine amount, fine interval, and maximum fine.

   This is optional. If you wish to set up new fine rules on recalled items, follow the example quoted in the Library Settings Editor. Make sure the brackets and double quotation around the fine interval are included.

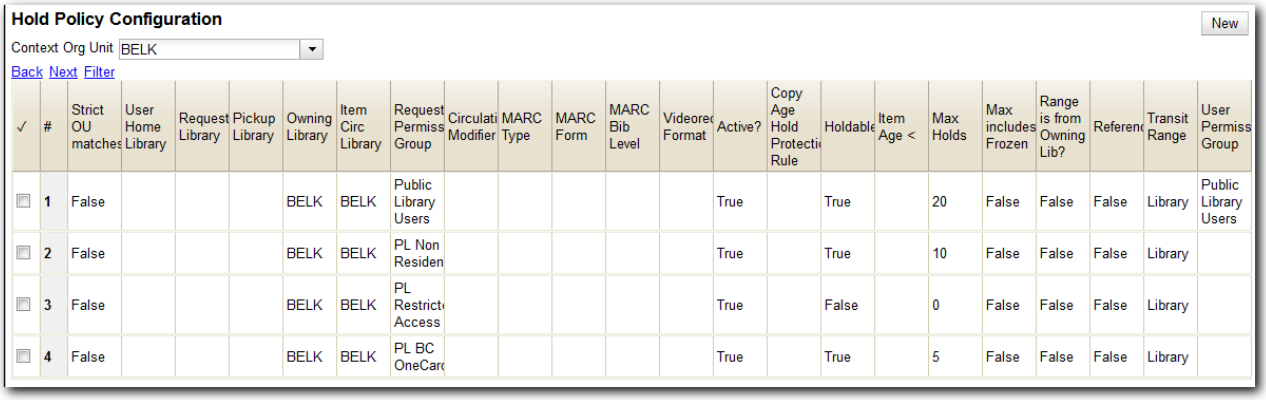
48.11. Hold Policies

1. A user with LSA privileges can view your library's hold policies. Changes to hold policies can be requested through the Sitka support team.

   Select *Admin* → *Local Administration* → *Hold Policies*.

2. Select your library from the drop down list after *Context Org Unit*.

The first screen provides a summary view of each hold rule for your library, and more detail can be seen by clicking on the individual entries.

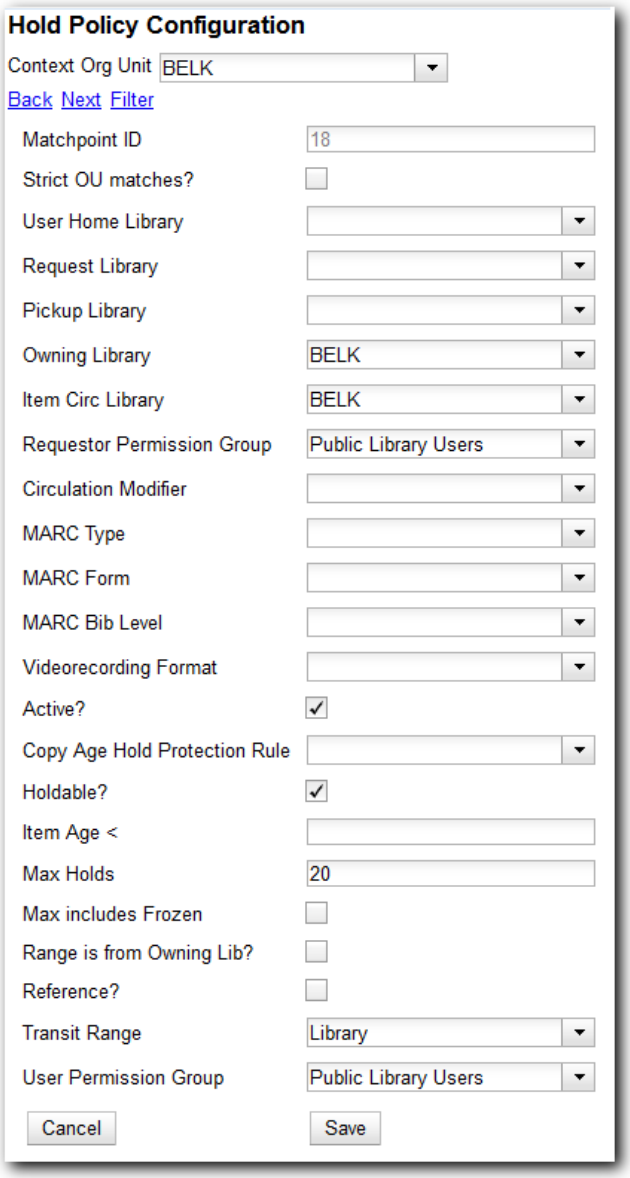


✓	#	Strict OU matches	User Home Library	Request Library	Pickup Library	Owning Library	Item Circ Library	Request Permiss Group	Circulati Modifier	MARC Type	MARC Form	MARC Bib Level	Videorec Format	Active?	Copy Age Hold Protecti Rule	Holdable	Item Age <	Max Holds	Max includes Frozen	Range is from Owning Lib?	Referenc	Transit Range	User Permiss Group
☐	1	False				BELK	BELK	Public Library Users						True		True		20	False	False	False	Library	Public Library Users
☐	2	False				BELK	BELK	PL Non Residen						True		True		10	False	False	False	Library	
☐	3	False				BELK	BELK	PL Restricte Access						True		False		0	False	False	False	Library	
☐	4	False				BELK	BELK	PL BC OneCard						True		True		5	False	False	False	Library	

The Hold Policy for each library or library system defines who can place how many holds on what types of materials. It also defines whether the library's materials can be used to fill holds picked up at other libraries. Hold policies are usually defined by a combination of the Requestor Permission Group (eg. Public Library Users, Public Library Staff etc.), item attributes like circulation modifier (eg. books, juvenile-collection etc.), and library (user home, items' owning and circulating library) with additional parameters of maximum holds and whether a hold can be placed at all. *Transit Range* defines where the library's materials can go to fill holds.

3. Select the individual hold policy for viewing by double-clicking on the desired row.

   In the below example, Public Library Users are able to place holds on BELK library's items of any circulation modifier and pick up these items at BELK library. They can have up to a maximum of 20 holds.

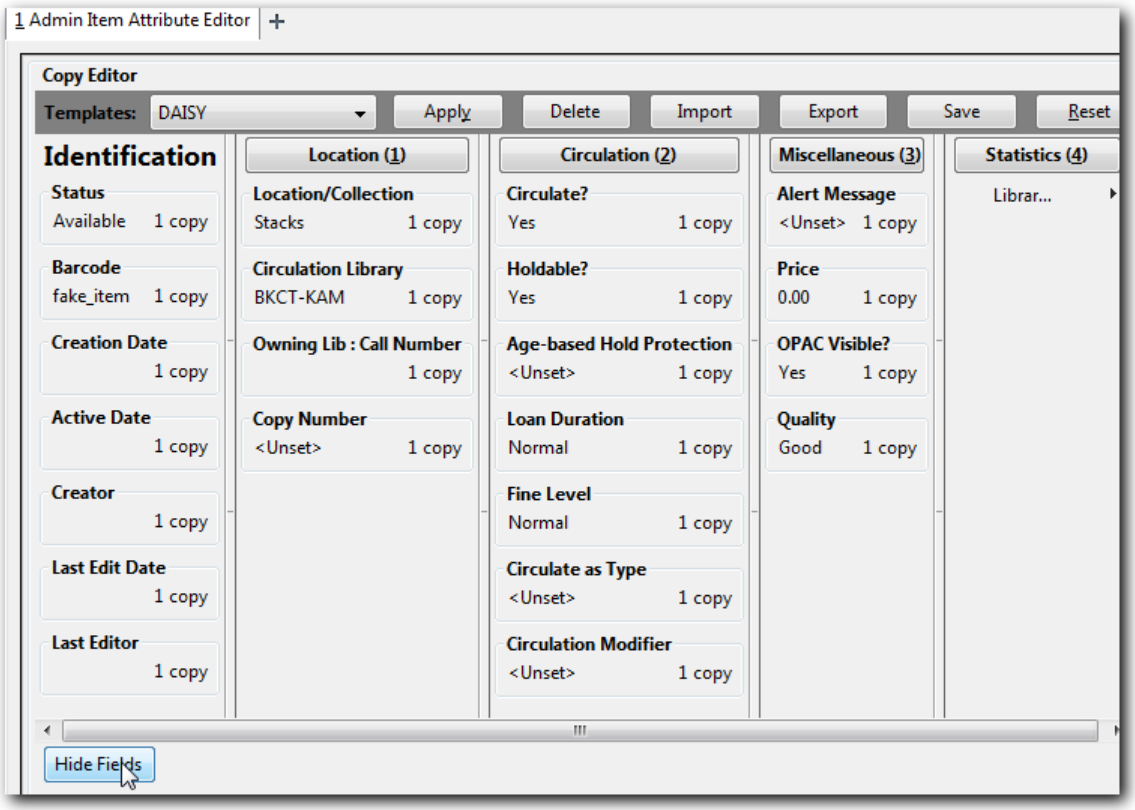


48.12. Item Attribute Editor

This is where you can choose to hide some unused fields on *Edit Item Attibute*, (aka *Copy Editor*) screen, such as *Deposit Amount*.

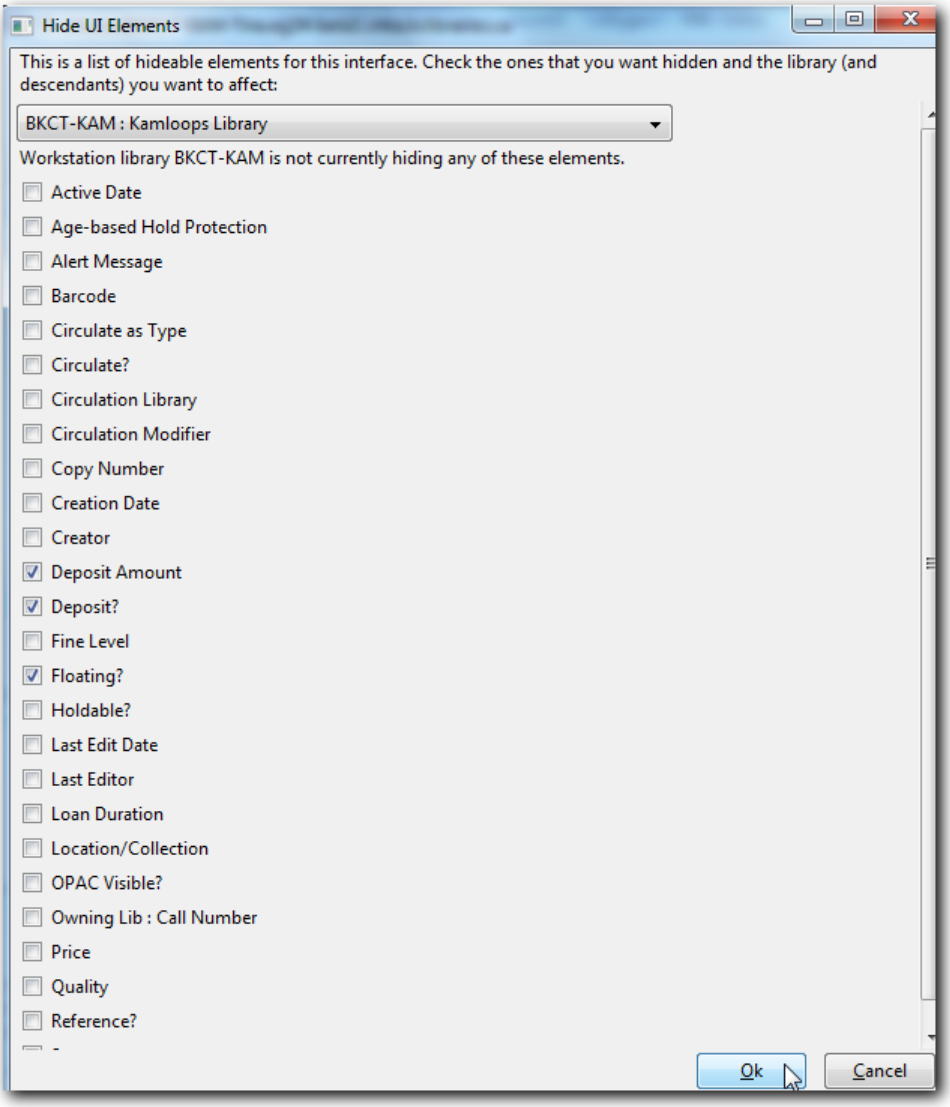
1. Select *Admin* → *Local Administration* → *Edit Item Attribute* The *Copy Editor* opens.

2. Click *Hide Fields* button at the left bottom corner.



3. By default your library is displayed on top of the list. If you wish to hide fields for all branches of your library system, change it to your library system.

   Check the field(s) that you want to hide and click *OK* button. Those selected fields will disappear from the *Copy Editor*. Close the tab.



4. If you wish to unhide a field, repeat the above step 1 and 2. Deselect the field and click *OK*.

48.13. Library Settings Editor

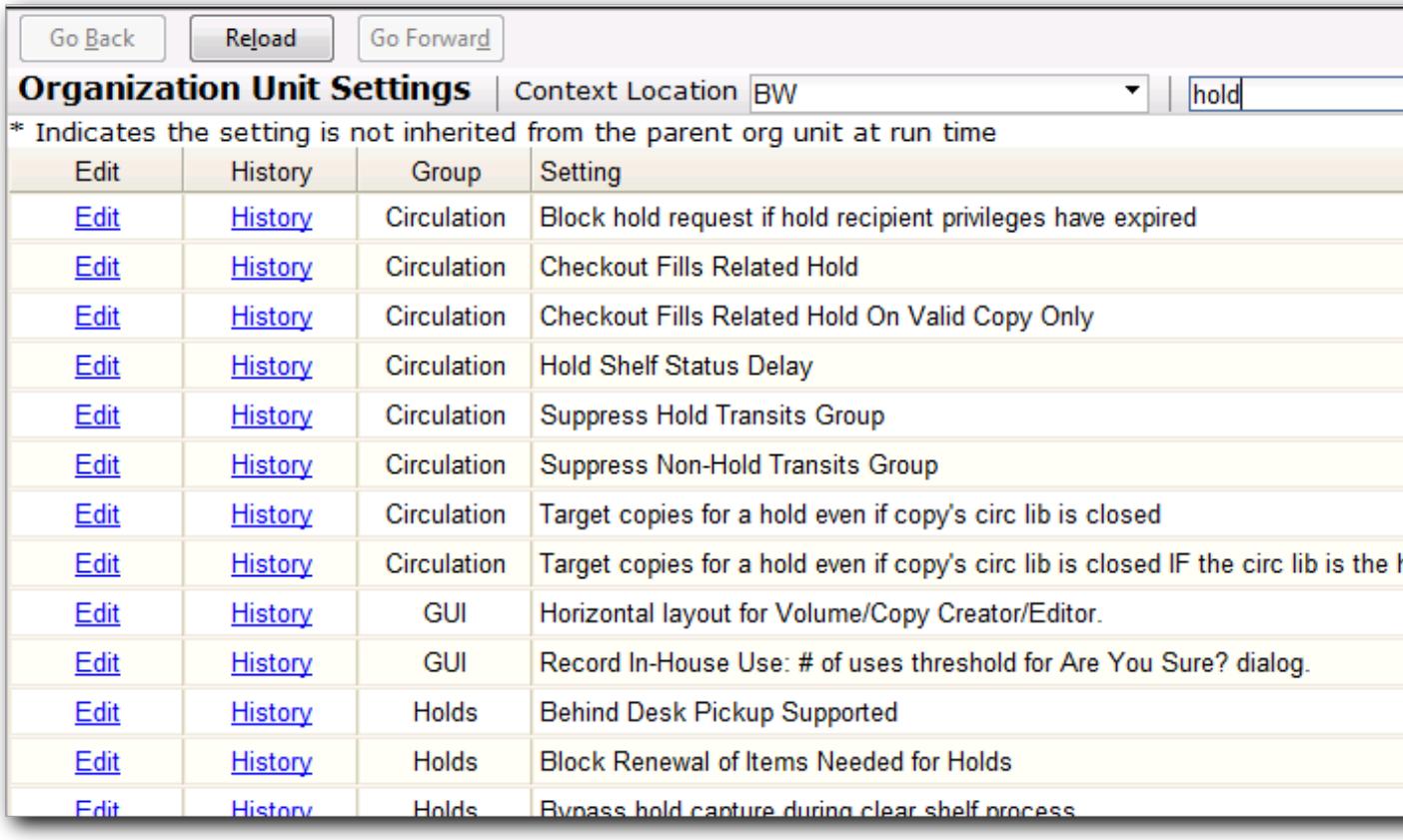
With the *Library Settings Editor* local system administrators (LSA) can optionally customize Evergreen's behaviour for a particular library or library system. For descriptions of available settings see the Settings Overview table below. Most settings can be changed in the staff client but some Sitka-wide defaults are maintained by the support team. All staff accounts can view library settings but an LSA login is required to make changes.

New Sitka libraries should set up local settings as soon as possible after migration.

Editing Library Settings

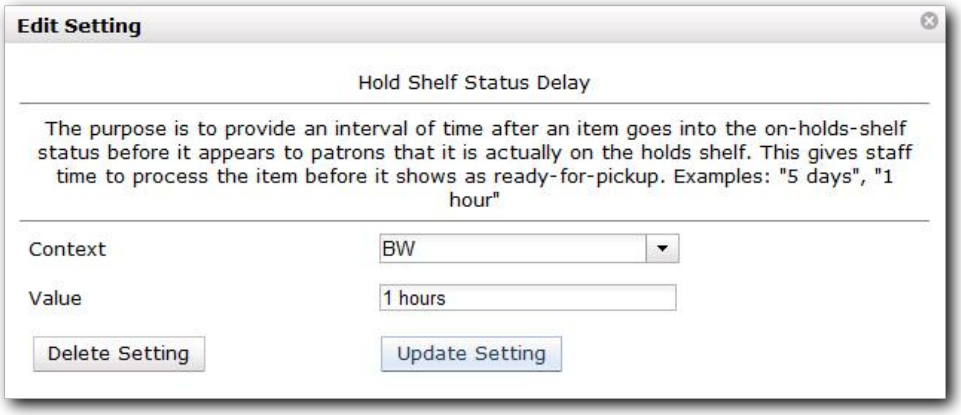
1. To open the *Library Settings Editor* select *Admin* → *Local Administration* → *Library Settings Editor*.

2. Settings having effects on the same function or module are grouped together. You may browse the list or search for the entry you want to edit. Type in your search term in the filter box. You may clear or re-apply the filter by clicking *Clear Filter* or *Filter*.

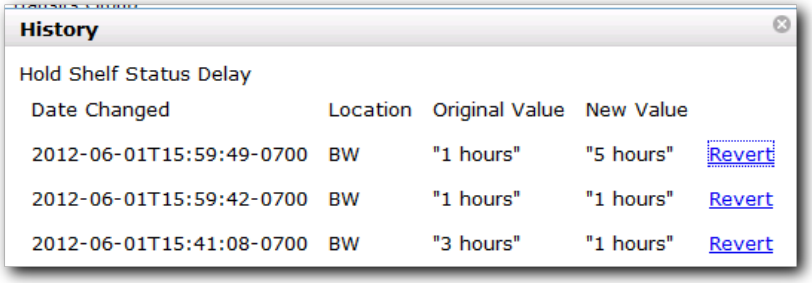

Go Back
Reload
Go Forward
Organization Unit Settings
Context Location
BW
hold
* Indicates the setting is not inherited from the parent org unit at run time
Edit
History
Group
Setting
Edit History Circulation Block hold request if hold recipient privileges have expired
Edit History Circulation Checkout Fills Related Hold
Edit History Circulation Checkout Fills Related Hold On Valid Copy Only
Edit History Circulation Hold Shelf Status Delay
Edit History Circulation Suppress Hold Transits Group
Edit History Circulation Suppress Non-Hold Transits Group
Edit History Circulation Target copies for a hold even if copy's circ lib is closed
Edit History Circulation Target copies for a hold even if copy's circ lib is closed IF the circ lib is the h
Edit History GUI Horizontal layout for Volume/Copy Creator/Editor.
Edit History GUI Record In-House Use: # of uses threshold for Are You Sure? dialog.
Edit History Holds Behind Desk Pickup Supported
Edit History Holds Block Renewal of Items Needed for Holds
Edit History Holds Bypass hold capture during clear shelf process

3. To edit an entry click *Edit* in the line.

4. Read the instruction in the pop-up window. Make the change. Click *Update Setting* to save the change. Click *Delete Setting* if you wish to delete it.


Edit Setting
Hold Shelf Status Delay
The purpose is to provide an interval of time after an item goes into the on-holds-shelf status before it appears to patrons that it is actually on the holds shelf. This gives staff time to process the item before it shows as ready-for-pickup. Examples: "5 days", "1 hour"
Context
BW
Value
1 hours
Delete Setting
Update Setting

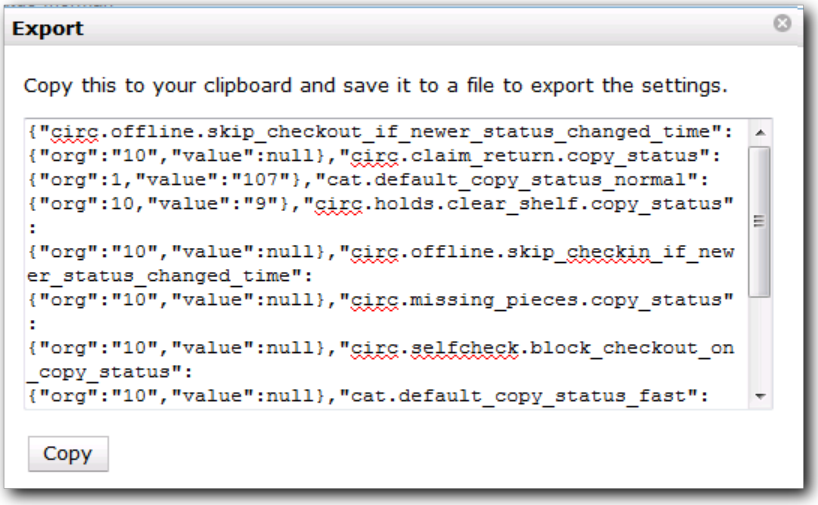
5. Click *History* to view the previous values, if any, of a setting. You can revert back to an old value by clicking *revert*.



Please note that different settings may require different data format, which is listed in the Settings Overview table. Refer to the Data Type table at the bottom of this page to find the data format used for each data type.

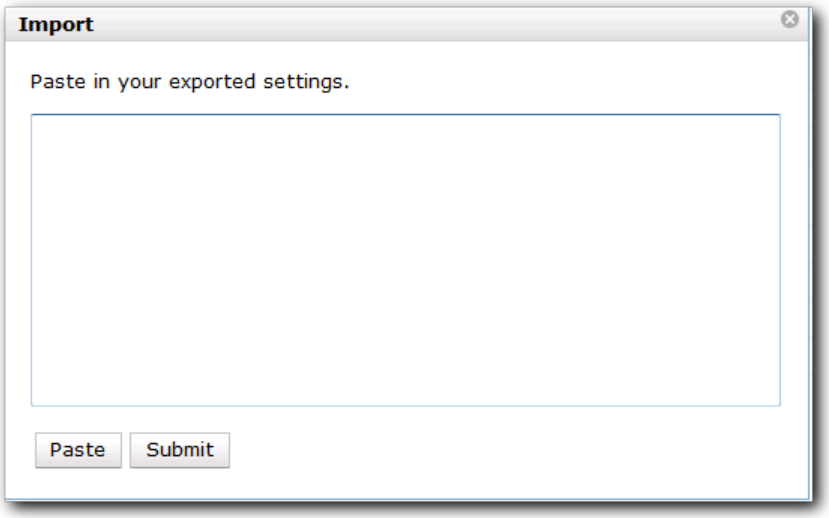
Exporting/Importing Library Settings

To export library settings, click *Export* button on the above *Library Setting Editor* screen. Click *Copy* in the pop-up window. Those settings displayed on the screen are copied to clipboard. Paste the content to a text editor, such as Notepad. Save the file on your computer.



To import library settings, click *Import* button on *Library Settings Editor* screen.

Open your previously saved file and copy the content. Click *Paste* in the pop-up window. Click *Submit*.



The exported settings may inlcude entries with context of Sitka. When importing settings with such entries you may see errors of permission denied. This is considered normal as LSA can not and should not edit entries in the Sitka context.

Settings Overview

The settings are grouped together in separate tables based on functions and modules, which are affected by the setting. They are in the same sequence as you see in the staff client. Each table describes the available settings in the group and shows which can be changed on a per-library basis. At bottom is the table with a list of data types [463] with details about acceptable settings values.

For settings used by Acquisitions Module, please refer to Acquisition User Manual.

Long Overdue item status is not in use in Sitka, thus none of the long overdue related entries are included in the table below.

Table 48.1. Booking and Cataloguing

Setting	Description	Data type	Edited by	Notes
Booking Allow email notify	Permit email notification when a reservation is ready for pickup.	True/false	LSA	
Default Classification Scheme	Defines the default classification scheme for new call numbers: 1 = Generic; 2 = Dewey; 3 = LC	Number	Sitka	Affects call number sorting
Default copy status (fast add)	Default status when a copy is created using the "Fast Item Add" interface.	Selection list	LSA	Default: In process

Setting	Description	Data type	Edited by	Notes
Default copy status (normal)	Default status when a copy is created using the normal volume/ copy creator interface.	Selection list	LSA	Default: In Process
Defines the control number identifier used in 003 and 035 fields	Admin setting		Sitka	
Delete bib if all copies are deleted via Acquisitions lineitem cancellation.		True/False	Sitka	
Delete volume with last copy	Automatically delete a volume when the last linked copy is deleted.	True/False	Sitka	Default TRUE.
Maximum Parallel Z39.50 Batch Searches	The maximum number of Z39.50 searches that can be in-flight at any given time when performing batch Z39.50 searches.	Number	Sitka	
Maximum Z39.50 Batch Search Results	The maximum number of search results to retrieve and queue for each record + Z39 source during batch Z39.50 searches	Number	Sitka	
Spine and pocket label font family	Set the preferred font family for spine and pocket labels. You can specify a list of fonts, separated by commas, in order of preference; the system will use the first font it finds with a matching name. For example, "Arial, Helvetica, serif".	Text	LSA	
Spine and pocket label font size	Set the default font size for spine and pocket labels	Number	LSA	
Spine and pocket label font weight	Set the preferred font weight for spine and pocket labels. You can specify "normal", "bold", "bolder", or "lighter".	Text	LSA	
Spine label left margin	Set the left margin for spine labels in number of characters.	Number	LSA	
Spine label line width	Set the default line width for spine labels in number of characters. This specifies the boundary at which lines must be wrapped.	Number	LSA	
Spine label maximum lines	Set the default maximum number of lines for spine labels.	Number	LSA	

Table 48.2. Circulation

Setting	Description	Data type	Edited by	Notes
Auto-extend grace periods	When enabled grace periods will auto-extend. By default this will be only when they are a full day or more and end on a closed date, though other options can alter this.	True/False	LSA	
Auto-extending grace periods extend for all closed dates	It works when the above setting "Auto-Extend Grace Periods" is set to TRUE. If enabled, when the grace period falls on a closed date(s), it will be extended past all closed dates that intersect, but within the hard-coded limits (your library's grace period).	True/False	LSA	
Auto-extending grace periods include trailing closed dates	It works when the above setting "Auto-Extend Grace Periods" is set to TRUE. If enabled, grace periods will include closed dates that directly follow the last day of the grace period. A backdated checkin with effective date on the closed dates will assume the item is returned after hours on the last day of the grace period.	True/False	LSA	Useful when libraries' bookdrop equipped with AMH.
Block hold request if hold recipient privileges have expired		True/False	LSA	
Cap max fine at item price	This prevents the system from charging more than the item price in overdue fines	True/False	LSA	
Charge fines on overdue circulations when closed	When set to True, fines will be charged during scheduled closings and normal weekly closed days.	True/False	LSA	
Checkout fills related hold	When a patron checks out an item and they have no holds that directly target the item, the system will attempt to find a hold for the patron that could be fulfilled by the checked out item and fulfills it. On the Staff Client you may notice that when a patron checks out an item under a title on which he/she has a hold, the hold will be treated as filled though the item has not been assigned to the patron's hold.	True/false	LSA	

Setting	Description	Data type	Edited by	Notes
Checkout fills related hold on valid copy only	When filling related holds on checkout only match on items that are valid for opportunistic capture for the hold. Without this set a Title or Volume hold could match when the item is not holdable. With this set only holdable items will match.	True/False	LSA	
Checkout auto renew age	When an item has been checked out for at least this amount of time, an attempt to check out the item to the patron that it is already checked out to will simply renew the circulation. If the checkout attempt is done within this time frame, Evergreen will prompt for choosing Renewing or Checkin then Checkout the item.	Duration	LSA	
Do not change fines/ fees on zero-balance LOST transaction	When an item has been marked lost and all fines/fees have been completely paid on the transaction, do not void or reinstate any fines/ fees EVEN IF Void Lost Item Billing When Returned, and/or Void Processing Fee on Lost Item Return, and/or Restore Overdues on Lost Item Return are enabled. This setting has no effect on partially resolved bills.	True/False	LSA	2.8. Set it to True if your library does not refund lost and paid items.
Do not include outstanding Claims Returned circulations in lump sum tallies in Patron Display.	In the Patron Display interface, the number of total active circulations for a given patron is presented in the Summary sidebar and underneath the Items Out navigation button. This setting will prevent Claims Returned circulations from counting toward these tallies.	True/False	LSA	
Hold shelf status delay	The purpose is to provide an interval of time after an item goes into the on-holds-shelf status before it appears to patrons that it is actually on the holds shelf. This gives staff time to process the item before it shows as ready-for-pickup.	Duration	LSA	
Include Lost circulations in lump sum tallies in Patron Display.	In the Patron Display interface, the number of total active circulations for a given patron is presented in the Summary sidebar and underneath the Items Out navigation button.	True/False	LSA	

Setting	Description	Data type	Edited by	Notes
	This setting will include Lost circulations as counting toward these tallies.			
Invalid patron address penalty	When set, if a patron address is set to invalid, a penalty is applied.	True/False	LSA	
Item status for missing pieces	This is the Item Status to use for items that have been marked or scanned as having Missing Pieces. In the absence of this setting, the Damaged status is used.	Selection list	LSA	
Load patron from Checkout	When scanning barcodes into Checkout auto-detect if a new patron barcode is scanned and auto-load the new patron.	True/False	LSA	Not in use
Lost checkin generates new overdues	Enabling this setting causes retroactive creation of not-yet-existing overdue fines on lost item checkin, up to the point of checkin time (or max fines is reached). This is different than "restore overdue on lost", because it only creates new overdue fines. Use both settings together to get the full complement of overdue fines for a lost item	True/False	LSA	
Lost items usable on checkin	Lost items are usable on checkin instead of going 'home' first	True/false	LSA	
Max patron claims returned count	When this count is exceeded, a staff override is required to mark the item as claims returned.	Number	LSA	
Maximum visible age of User Trigger Events in Staff Interfaces	If this is unset, staff can view User Trigger Events regardless of age. When this is set to an interval, it represents the age of the oldest possible User Trigger Event that can be viewed.	Duration	LSA	Not working
Minimum transit checkin interval	In-Transit items checked in this close to the transit start time will be prevented from checking in	Duration	LSA	
Patron merge address delete	Delete address(es) of subordinate user(s) in a patron merge.	True/False	LSA	
Patron merge barcode delete	Delete barcode(s) of subordinate user(s) in a patron merge	True/False	LSA	
Patron merge deactivate card	Mark barcode(s) of subordinate user(s) in a patron merge as inactive.	True/False	LSA	

Setting	Description	Data type	Edited by	Notes
Patron Registration: Cloned patrons get address copy	If True, in the Patron editor, addresses are copied from the cloned user. If False, addresses are linked from the cloned user which can only be edited from the cloned user record.	True/False	LSA	
Printing: custom Javascript file	Full URL path to a Javascript File to be loaded when printing. Should implement a print_custom function for DOM manipulation. Can change the value of the do_print variable to false to cancel printing.	Text		
Require matching email address for password reset requests		True/False	LSA	
Restore overdues on lost item return	If true when a lost item is checked in overdue fines are charged (up to the maximum fines amount)	True/False	LSA	
Specify search depth for the duplicate patron check in the patron editor	When using the patron registration page, the duplicate patron check will use the configured depth to scope the search for duplicate patrons.	Number	Sitka	
Suppress hold transits group	To create a group of libraris to supress Hold Transits among them. All libraries in the group should use the same unique vaule. Leave it empty if transits should not be suppressed.	Text	Sitka	Not in use
Suppress non-hold transits group	To create a group of libraris to supress Non-Hold Transits among them. All libraries in the group should use the same unique vaule. Leave it empty if Non-Hold Transits should not be suppressed.	Text	Sitka	
Suppress popup-dialogs during check-in.	When set to True, no pop-up window for exceptions on check-in. But the accompanying sound will be played.	True/False	LSA	
Target copies for a hold even if copy's circ lib is closed	If this setting is true at a given org unit or one of its ancestors, the hold targeter will target copies from this org unit even if the org unit is closed (according to the actor.org_unit.closed_date table).	True/False	LSA	
Target copies for a hold even if copy's circ lib is	If this setting is true at a given org unit or one of its ancestors, the	True/False	LSA	

Setting	Description	Data type	Edited by	Notes
closed IF the circ lib is the hold's pickup lib	hold targeter will target copies from this org unit even if the org unit is closed (according to the actor.org_unit.closed_date table) IF AND ONLY IF the copy's circ lib is the same as the hold's pickup lib.			
Truncate fines to max fine amount		True/False	LSA	Sitka default TRUE
Use Lost and Paid copy status		True/False	Sitka	Sitka default TRUE
Warn when patron account is about to expire	If set, the staff client displays a warning this number of days before the expiry of a patron account. Value is in number of days.	Duration	LSA	
Void lost item billing when claims returned	If True, when a lost item is claimed returned, the item replacement bill (item price) is voided.	True/False	LSA	2.8
Void processing fee on lost item claims returned	If True, the processing fee is voided when a lost item is claimed returned.	True/false	LSA	2.8
Void lost item billing when returned	If True,when a lost item is checked in the item replacement bill (item price) is voided. If the patron has already paid the bill a credit is applied. But libraries may choose not to adjust bills if already resolved by: Do not change fines/fees on zero-balance LOST transaction.	True/false	LSA	
Void lost max interval	Items that have been overdue this long will not result in lost charges being voided when returned, and the overdue fines will not be restored, either. Only applies if *Circ: Void lost item billing* or *Circ: Void processing fee on lost item* are true.	Duration	LSA	
Void processing fee on lost item return	If True, the processing fee is voided when a lost item is returned	True/false	LSA	

Long Overdue status is not in use on Sitka Evergreen. All settings related to Long Overdue may be ignored.

Table 48.3. Credit Card Processing

Credit card payment is not currently supported.
All settings can be ignored.

Table 48.4. Finances

Setting	Description	Data type	Edited by	Notes
Allow credit card payments	If enabled, patrons will be able to pay fines accrued at this location via credit card.	True/False	Sitka	Not in use
Charge item price when marked damaged	If true Evergreen bills item price to the last patron who checked out the damaged item. Staff receive an alert with patron information and must confirm the billing.	True/false	LSA	
Charge lost on zero	If set to True, default item price will be charged when an item is marked lost even though the price in item record is 0.00 (same as no price). If False, only processing fee, if used, will be charged.	True/false	LSA	
Charge processing fee for damaged items	Optional processing fee billed to last patron who checked out the damaged item. Staff receive an alert with patron information and must confirm the billing.	Number(dollar)	LSA	Disabled when set to 0
Default item price	Replacement charge for lost items if price is unset in the *Copy Editor*. . Does not apply if item price is set to $0	Number(dollar)	LSA	
Disable Patron Credit	Do not allow patrons to accrue credit or pay fines/fees with accrued credit.	True/Fasle	LSA	If set to TRUE, Patron Credit will not be displayed on Bills screen.
Leave transaction open when lost balance equals zero	If True, it leaves the lost copy on the patron record when it is paid.	True/False	Sitka	Sitka default False
Lost materials processing fee	The amount charged in addition to item price when an item is marked lost.	Number (dollar)	LSA	
Maximum Item Price	When charging for lost items, limit the charge to this as a maximum.	Number(dollar)	LSA	
Minimum Item Price	When charging for lost items, charge this amount as a minimum.	Number(dollar)	LSA	
Void overdue fines when items are marked lost	If true overdue fines are voided when an item is marked lost	True/false	LSA	

Table 48.5. GUI: Graphic User Interface

Setting	Description	Data type	Edited by	Notes
Alert on empty bib records	Alert staff when the last copy for a record is being deleted.	True/False	LSA	
Button bar	If TRUE, the staff client button bar appears by default on all workstations registered to your library; staff can override this setting at each login.	True/False	LSA	
Cap results in Patron Search at this number.	The maximum number of resutls returned per search. If 100 is set up here, any search will return 100 records at most.	Number	LSA	
Default Country for New Addresses in Patron Editor	This is the default Country for new addresses in the patron editor.	Text	LSA	
Default hotkeyset	Default Hotkeyset for clients (filename without the .keyset). Examples: Default, Minimal, and None	Text	LSA	Individual workstations' default overrides this setting.
Default ident type for patron registration	This is the default Ident Type for new users in the patron editor.	Selection list	LSA	
Default showing suggested patron registration fields	Instead of All fields, show just suggested fields in patron registration by default.	True/False	LSA	
Disable the ability to save list column configurations locally.	GUI: Disable the ability to save list column configurations locally. If set, columns may still be manipulated, however, the changes do not persist. Also, existing local configurations are ignored if this setting is true.	True/False	LSA	
Example for Day_phone field on patron registration	The example on validation on the Day_phone field in patron registration.	Text	LSA	
Example for Email field on patron registration	The example on validation on the Email field in patron registration.	Text	LSA	
Example for Evening-phone on patron registration	The example on validation on the Evening-phone field in patron registration.	Text	LSA	
Example for Other-phone on patron registration	The example on validation on the Other-phone field in patron registration.	Text	LSA	
Example for phone fields on patron registration	The example on validation on phone fields in patron registration. Applies	Text	LSA	

Setting	Description	Data type	Edited by	Notes
	to all phone fields without their own setting.			
Example for Postal Code field on patron registration	The example on validation on the Postal Code field in patron registration.	Text	LSA	
Format Dates with this pattern.	Format Dates with this pattern (examples: "yyyy-MM-dd" for "2010-04-26", "MMM d, yyyy" for "Apr 26, 2010"). Formats are effective in display (not editing) area.	Text	LSA	
Format Times with this pattern.	Format Times with this pattern (examples: "h:m:s.SSS a z" for "2:07:20.666 PM Eastern Daylight Time", "HH:mm" for "14:07"). Formats are effective in display (not editing) area.	Text	LSA	
GUI: Hide these fields within the Item Attribute Editor.		Text	LSA	
Horizontal layout for Volume/Copy Creator/ Editor.	The main entry point for this interface is in Holdings Maintenance, Actions for Selected Rows, Edit Item Attributes / Call Numbers / Replace Barcodes. This setting changes the top and bottom panes (if FALSE) for that interface into left and right panes (if TRUE).	True/False	LSA	
Idle timeout	If you want staff client windows to be minimized after a certain amount of system idle time, set this to the number of seconds of idle time that you want to allow before minimizing (requires staff client restart).	Number	LSA	
Items Out Claims Returned display setting	Value is a numeric code, describing which list the circulation should appear while checked out and whether the circulation should continue to appear in the bottom list, when checked in with oustanding fines. 1 = top list, bottom list. 2 = bottom list, bottom list. 5 = top list, do not display. 6 = bottom list, do not display.	Number	LSA	default=2
Items Out Lost display setting	Value is a numeric code, describing which list the circulation should	Number	LSA	default=2

Setting	Description	Data type	Edited by	Notes
	appear while checked out and whether the circulation should continue to appear in the bottom list, when checked in with oustanding fines. 1 = top list, bottom list. 2 = bottom list, bottom list. 5 = top list, do not display. 6 = bottom list, do not display.			
Max user activity entries to retrieve (staff client)	Sets the maxinum number of recent user activity entries to retrieve for display in the staff client.	Number	LSA	
Maximum previous checkouts displayed	The maximum number of previous circulations the staff client will display when investigating item details	Number	LSA	
Patron circulation summary is horizontal		True/False	LSA	
Record in-house use: # of uses threshold for Are You Sure? dialog.	In the Record In-House Use interface, a submission attempt will warn if the # of uses field exceeds the value of this setting.	Number	LSA	
Record In-House Use: Maximum # of uses allowed per entry.	The # of uses entry in the Record In-House Use interface may not exceed the value of this setting.	Number	LSA	
Regex for Day_phone field on patron registration	The Regular Expression for validation on the Day_phone field in patron registration. Note: The first capture group will be used for the "last 4 digits of phone number" as patron password feature, if enabled. Ex: "[2-9]\d{2}-\d{3}-(\d{4})(x\d +)?" will ignore the extension on a NANP number.	Regular expression	LSA	
Regex for Email field on patron registration	The Regular Expression on validation on the Email field in patron registration.	Regular expression	LSA	
Regex for Evening-phone on patron registration	The Regular Expression on validation on the Evening-phone field in patron registration.	Regular expression	LSA	
Regex for Other-phone on patron registration	The Regular Expression on validation on the Other-phone field in patron registration.	Regular expression	LSA	
Regex for phone fields on patron registration	The Regular Expression on validation on phone fields in patron	Regular expression	LSA	

Setting	Description	Data type	Edited by	Notes
	registration. Applies to all phone fields without their own setting.			
Regext for Postal Code field on patron registration	The Regular Expression on validation on the Postal Code field in patron registration.	Regular expression	LSA	
Require at least one address for Patron Registration	Enforces a requirement for having at least one address for a patron during registration. If set to False, you need to delete the empty address before saving the record. If set to True, deletion is not allowed.	True/False	LSA	
Require XXXXX field on patron registration	The XXXXX field will be required on the patron registration screen.	True/False	LSA	XXXXX can be Country, Day-phone, Evening-phone, Other-phone, DOB, Email, or Prefix.
Require staff initials for entry/edit of copy notes	Appends staff initials and edit date into note content.	True/False	LSA	
Require staff initials for entry/edit of patron notes.	Appends staff initials and edit date into note content.	True/False	LSA	
Require staff initials for entry/edit of patron standing penalties and messages	Appends staff initials and edit date into patron standing penalties and messages.	True/False	LSA	
Show billing tab first when bills are present	If true accounts for patrons with bills will open to the billing tab instead of check out	True/false	LSA	
Show XXXXX field on patron registration	The XXXXX field will be shown on the patron registration screen. Showing a field makes it appear with required fields even when not required. If the field is required this setting is ignored.	True/False	LSA	
Suggest XXXXX field on patron registration	The XXXXX field will be suggested on the patron registration screen. Suggesting a field makes it appear when suggested fields are shown. If the field is shown or required this setting is ignored.	True/False	LSA	
Toggle off the patron summary sidebar after first view.	When true, the patron summary sidebar will collapse after a new patron sub-interface is selected.	True/False	LSA	

Setting	Description	Data type	Edited by	Notes
URL for remote directory containing list column settings.	The format and naming convention for the files found in this directory match those in the local settings directory for a given workstation. An administrator could create the desired settings locally and then copy all the tree_columns_for_* files to the remote directory.	Text		Not in use
Uncheck bills by default in the patron billing interface	Uncheck bills by default in the patron billing interface, and focus on the Uncheck All button instead of the Payment Received field.	True/False	LSA	
Unified Volume/Item Creator/Editor	If True, combines the Volume/Copy Creator and Item Attribute Editor in some instances.	True/False	LSA	
Work Log: maximum actions logged	Maximum entries for "Most Recent Staff Actions" section of the Work Log interface.	Number	LSA	
Work Log: maximum patrons logged	Maximum entries for "Most Recently Affected Patrons..." section of the Work Log interface.	Number	LSA	

Table 48.6. Global

Setting	Description	Data type	Edited by	Notes
Allow multiple username changes	If enabled (and Lock Usernames is not set) patrons will be allowed to change their username when it does not look like a barcode. Otherwise username changing in the OPAC will only be allowed when the patron's username looks like a barcode.	True/False	Sitka	Default TRUE.
Global default locale		Text	Sitka	Default: Canada
Lock Usernames	If enabled username changing via the OPAC will be disabled.	True/False	Sitka	Default FALSE
Password format	Defines acceptable format for OPAC account passwords	Regular expression	Sitka	Default requires that passwords "be at least 7 characters in length, contain at least one letter (a-z/A-Z), and contain at least one number.
Patron barcode format	Defines acceptable format for patron barcodes	Regular expression	Sitka	

Setting	Description	Data type	Edited by	Notes
Patron username format	Regular expression defining the patron username format, used for patron registration and self-service username changing only	Regular expression	Sitka	

Table 48.7. Holds

Setting	Description	Data type	Edited by	Notes
Behind desk pickup supported	If a branch supports both a public holds shelf and behind-the-desk pickups, set this value to true. This gives the patron the option to enable behind-the-desk pickups for their holds by selecting Hold is behind Circ Desk flag in patron record.	True/False	LSA	
Best-hold selection sort order	Defines the sort order of holds when selecting a hold to fill using a given copy at capture time	Selection list	Sitka	
Block renewal of items needed for holds	When an item could fulfill a hold, do not allow the current patron to renew	True/False	Sitka	
Cancelled holds display age	Show all cancelled holds that were cancelled within this amount of time	Duration	LSA	
Cancelled holds display count	How many cancelled holds to show in patron holds interfaces	Number	LSA	
Clear shelf copy status	Any copies that have not been put into reshelving, in-transit, or on-holds-shelf (for a new hold) during the clear shelf process will be put into this status. This is basically a purgatory status for copies waiting to be pulled from the shelf and processed by hand	Selection list	Sitka	
Default estimated wait	When predicting the amount of time a patron will be waiting for a hold to be fulfilled, this is the default estimated length of time to assume an item will be checked out.	Duration	Sitka	Not applicable in Sitka OPAC
Default hold shelf expire interval	Hold Shelf Expiry Time is calculated and inserted into hold record based on this interval when capturing a hold.	Duration	LSA	
Expire alert interval	Time before a hold expires at which to send an email notifying the patron	Duration	Sitka	Not in use
Expire interval	Amount of time until an unfulfilled hold expires	Duration	LSA	

Setting	Description	Data type	Edited by	Notes
Hard boundary	Administrative setting for Sitka use only	Number	Sitka	
Hard stalling interval		Duration	Sitka	
Has local copy alert	If there is an available copy at the requesting library that could fulfill a hold during hold placement time, alert the patron.	True/False	LSA	
Has local copy block	If there is an available copy at the requesting library that could fulfill a hold during hold placement time, do not allow the hold to be placed.	True/False	LSA	
Max foreign-circulation time	Time a copy can spend circulating away from its circ lib before returning there to fill a hold	Duration	Sitka	
Maximum library target attempts	When this value is set and greater than 0, the system will only attempt to find a copy at each possible branch the configured number of times	Number	Sitka	
Minimum estimated wait	When predicting the amount of time a patron will be waiting for a hold to be fulfilled, this is the minimum estimated length of time to assume an item will be checked out.	Duration	Sitka	Not applicable in Sitka OPAC
Org unit target weight	Org Units can be organized into hold target groups based on a weight. Potential copies from org units with the same weight are chosen at random.	Number	Sitka	
Reset request time on un-cancel	When a hold is uncancelled, reset the request time to push it to the end of the queue	True/False	LSA	
Skip for hold targeting	When true, don't target any copies at this org unit for holds	True/False	Sitka	
Soft boundary	Holds will not be filled by copies outside this boundary if there are holdable copies within it.	Number	Sitka	
Soft stalling interval	For this amount of time, holds will not be opportunistically captured at non-pickup branches.	Duration	Sitka	
Use Active Date for age protection	When calculating age protection rules use the Active date instead of the Creation Date.	True/False	LSA	Default TRUE

Setting	Description	Data type	Edited by	Notes
Use weight-based hold targeting	Use library weight based hold targeting	True/False	Sitka	

Table 48.8. Library

Setting	Description	Data type	Edited by	Notes
Change reshelving status interval	Amount of time to wait before changing an item from “Reshelving” status to “available”	Duration	LSA	The default is at midnight each night for items with "Reshelving" status for over 24 hours.
Claim never checked out: mark copy as missing	When a circ is marked as claims-never-checked-out, mark the copy as missing	True/False	LSA	
Claim return copy status	Claims returned copies are put into Sitka wide default status of Claimed Returned. This is not configurable at library.	Selection list	Sitka	
Courier code	Courier Code for the library. Available in transit slip templates as the %courier_code% macro.	Text	LSA	Not in use
Juvenile age threshold	Upper cut-off age for patrons to be considered juvenile, calculated from date of birth in patron accounts	Duration (years)	LSA	
Library information URL	URL for information on this library, such as contact information, hours of operation, and directions. Use a complete URL, such as "http://example.com/hours.html".	Text	LSA	
Mark item damaged voids overdues	When an item is marked damaged, overdue fines on the most recent circulation are voided.	True/False	LSA	
Pre-cat item circ lib	Override the default circ lib of "here" with a pre-configured circ lib for pre-cat items. The value should be the "shortname" (aka policy name) of the org unit	Text	Sitka	
Telephony: Arbitrary line(s) to include in each notice callfile	This overrides lines from opensrf.xml. Line(s) must be valid for your target server and platform (e.g. Asterisk 1.4).	Text	Sitka	Not in use.
Use external "library information URL" in copy table, if available	If set to true, the library name in the copy details section will link to the URL associated with the "Library information URL" library setting	True/False	LSA	

Setting	Description	Data type	Edited by	Notes
	rather than the library information page generated by Evergreen.			

Table 48.9. OPAC

Setting	Description	Data type	Edited by	Notes
Allow Patron Self-Registration	Allow patrons to self-register, creating pending user accounts	True/False	Sitka	
Allow pending addresses	If true patrons can edit their addresses in the OPAC. Changes must be approved by staff	True/false	LSA	
Auto-Override Permitted Hold Blocks (Patrons)		True/false	Sitka	Defalt FALSE
Ignore the Global luri_as_copy flag for this OU	Admin setting on e-records scoping	True/False	Sitka	
Jump to details on 1 hit (OPAC)	When a search yields only 1 result, jump directly to the record details page. This setting only affects the public OPAC	True/False	LSA	
Jump to details on 1 hit (staff client)	When a search yields only 1 result, jump directly to the record details page. This setting only affects the PAC within the staff client	True/False	LSA	
Limit the depth of xxxxxx	Admin setting on e-record link display	Number	Sitka	
Limit the number of URIs on the results page	Admin setting on e-record link display	Number	Sitka	
OPAC login message	HTML blob to be rendered in an interstitial page upon OPAC login	Text	Sitka	
Number of staff client saved searches to display on left side of results and record details pages	If unset, the default is 10.	Number	LSA	
Open Reviews & More in a new tab	If set to TRUE, Reviews & More links in the search results to be opened in a new tab.	True/False	LSA	
Org unit hiding depth	Admin setting controlled by Sitka	Number	Sitka	
Org Unit is not a hold pickup library	If set, this org unit will not be offered to the patron as an option for a hold pickup location. This setting	True/False	Sitka	

Setting	Description	Data type	Edited by	Notes
	has no affect on searching or hold targeting.			
Paging shortcut links for OPAC Browse	The characters in this string, in order, will be used as shortcut links for quick paging in the OPAC browse interface. Any sequence surrounded by asterisks will be taken as a whole label, not split into individual labels at the character level, but only the first character will serve as the basis of the search.	Regular expression	Sitka	
Patron self-reg. display timeout	Number of seconds to wait before reloading the patron self-registration interface to clear sensitive data.	Duration	Sitka	
Patron self-reg. expire interval	If set, this is the amount of time a pending user account will be allowed to sit in the database. After this time, the pending user information will be purged.	Duration	Sitka	
Payment history age limit	The OPAC should not display payments by patrons that are older than any interval defined here.	Duration	LSA	Not in use
Specify how items are ordered	This value specifies how items are ordered in search results and record views within the org unit. To sort from newest to oldest by active date use 'desc'. To sort from oldest to newest by active date use 'asc'. To sort by call number use 'call'.	Text	LSA	Default is 'call'.
Tag Circulated Items in Results	When a user is both logged in and has opted in to circulation history tracking, turning on this setting will cause previous (or currently) circulated items to be highlighted in search results.	True/False	LSA	Default TRUE
Use fully compressed serial holdings	Show fully compressed serial holdings for all libraries at and below the current context unit	True/False	Sitka	
Warn patrons when adding to a temporary book list	Present a warning dialog when a patron adds a book to the temporary book list.	True/False	Sitka	

Table 48.10. Offline and Program

Setting	Description	Data type	Edited by	Notes
Skip offline checkin if newer item Status Changed Time.	Skip offline checkin transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False	LSA	
Skip offline checkout if newer item Status Changed Time.	Skip offline checkout transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False	LSA	
Skip offline renewal if newer item Status Changed Time.	Skip offline renewal transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False	LSA	
Disable automatic print attempt type list	Disable automatic print attempts from staff client interfaces for the receipt types in this list. Possible values: "Checkout", "Bill Pay", "Hold Slip", "Transit Slip", and "Hold/Transit Slip". This is different from the Auto-Print checkbox in the pertinent interfaces in that it disables automatic print attempts altogether, rather than encouraging silent printing by suppressing the print dialog. The Auto-Print checkbox in these interfaces have no effect on the behavior for this setting. In the case of the Hold, Transit, and Hold/Transit slips, this also suppresses the alert dialogs that precede the print dialog (the ones that offer Print and Do Not Print as options).	Text	LSA	
Retain empty bib records	Retain a bib record even when all attached copies are deleted	True/False	Sitka	Default FALSE based on Sitka cataloguing policy.
Sending email address for patron notices	This email address is for automatically generated patron	Text	LSA	

Setting	Description	Data type	Edited by	Notes
	notices (e.g. email overdues, email holds notification). It is good practice to set up a generic account, like info@nameofyourlibrary.ca, so that one person's individual email inbox doesn't get cluttered with emails that were not delivered.			

Table 48.11. Receipt Templates and SMS Text Message

Setting	Description	Data type	Edited by	Notes
Content of alert_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(alert_text)%	Text	LSA	
Content of event_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(event_text)%	Text	LSA	
Content of footer_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(footer_text)%	Text	LSA	
Content of header_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(header_text)%	Text	LSA	
Content of notice_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(notice_text)%	Text	LSA	
Disable auth requirement for texting call numbers.	Disable authentication requirement for sending call number information via SMS from the OPAC.	True/False	LSA	
Enable features that send SMS text messages.	Current features that use SMS include hold-ready-for-pickup notifications and a "Send Text" action for call numbers in the OPAC. If this setting is not enabled, the SMS options will not be offered to the user. Unless you are carefully silo-ing patrons and their use of the OPAC, the context org for this setting should be the top org in the org hierarchy, otherwise patrons can trample their user settings when jumping between orgs.	True/False	LSA	

Table 48.12. Security

Setting	Description	Data type	Edited by	Notes
Default level of patrons' internet access	Enter numbers 1 (Filtered), 2 (Unfiltered), or 3 (No Acess)	Number	LSA	
Maximum concurrently active self-serve password reset requests	Prevent the creation of new self-serve password reset requests until the number of active requests drops back below this number.	Number	Sitka	Not in use
Maximum concurrently active self-serve password reset requests per user	When a user has more than this number of concurrently active self-serve password reset requests for their account, prevent the user from creating any new self-serve password reset requests until the number of active requests for the user drops back below this number.	Number	Sitka	Not in use
OPAC inactivity timeout (in seconds)	Number of seconds of inactivity before OPAC accounts are automatically logged out. Sitka default is 420 seconds (7 minutes)	Number	LSA	
Obscure the Date of Birth field	When true, the Date of Birth column in patron lists will default to Not Visible, and in the Patron Summary sidebar the value will display as unless the field label is clicked.	True/False	LSA	
Offline: Patron usernames allowed	During offline circulations, allow patrons to identify themselves with usernames in addition to barcode. For this setting to work, a barcode format must also be defined	True/False		
Patron opt-in boundary	Admin setting		Sitka	
Patron opt-in default	Admin setting		Sitka	
Patron: password from phone #	If true the last 4 digits of the patron's phone number is the password for new accounts (password must still be changed at first OPAC login)	True/false	LSA	
Persistent login duration	How long a persistent login lasts, e.g. '2 weeks'	Duration	Sitka	
Self-serve password reset request time-to-live	Length of time (in seconds) a self-serve password reset request should remain active.	Duration	Sitka	
Staff login inactivity timeout (in seconds)	Number of seconds of inactivity before staff client prompts for login and password. Sitka default is 6000 seconds (2 hours)	Number	LSA	

Table 48.13. Self Check

Setting	Description	Data type	Edited by	Notes
Allow Fine printing	If true, there will be a print option on the fine list screen.	True/false	LSA	
Allow Hold printing	If true, there will be a print option on the hold list screen.	True/false	LSA	
Allow Items out printing	If true, there will be a print option on the items out list screen.	True/false	LSA	
Audio Alerts	Use audio alerts for selfcheck events.	True/false	LSA	
Block copy checkout status	List of copy status IDs that will block checkout even if the generic COPY_NOT_AVAILABLE event is overridden.	Number	LSA	Look up copy status ID from Server Admin.
Patron login timeout (in seconds)	Number of seconds of inactivity before the patron is logged out of the selfcheck interface.	Duration	LSA	
Pop-up alert for errors	If true, checkout/renewal errors will cause a pop-up window in addition to the on-screen message.	True/False	LSA	
Require patron password	If true, patrons will be required to enter their password in addition to their username/barcode to log into the selfcheck interface.	True/False	LSA	
Selfcheck override events list	List of checkout/renewal events that the selfcheck interface should automatically override instead instead of alerting and stopping the transaction.	Text	LSA	
Workstation Required	All selfcheck stations must use a workstation.	True/False	LSA	

Table 48.14. Other

Setting	Description	Data type	Edited by	Notes
Default display grouping for serials distributions presented in the OPAC.	Default display grouping for serials distributions presented in the OPAC. This can be "enum" or "chron".	Text	Sitka	
Previous issuance copy location	When a serial issuance is received, copies (units) of the previous issuance will be automatically moved into the configured shelving location.			

Setting	Description	Data type	Edited by	Notes
Maximum redirect lookups	Admin setting.	Number	Sitka	
Maximum wait time (in seconds) for a URL to lookup	Admin setting	Duration	Sitka	
Number of URLs to test in parallel	Admin setting	Number	Sitka	
Number of seconds to wait between URL test attempts	Admin setting	Duration	Sitka	
Vandelay default barcode prefix	Apply this prefix to any auto-generated item barcodes	Text	LSA	
Vandelay generate default barcodes	Auto-generate deault item barcodes when no item barcode is present.	True/False	LSA	
Vandelay default call number prefix	Apply this prefix to any auto-generated item call numbers.	Text	LSA	
Vandelay generate default call numbers	Auto-generate default item call numbers when no item call number is present.	True/False	LSA	
Vandelay default circulation modifier	Default circulation modifier value for imported items.	Selection list	LSA	
Vandelay default copy location	Default copy location value for imported items.	Selection list	LSA	
Vandelay default record match set	Admin setting	Selection list	Sitka	
Circ: default precat circ modifier		Selection List	LSA	
Claim Return: Mark copy as missing		True/False	Sitka	Default FALSE
Disallow circulation of items when they are on booking reserve and that reserve overlaps with the checkout period	When true, items on booking reserve during the proposed checkout period will not be allowed to circulate unless overridden with the COPY_RESERVED.override permission.	True/False	LSA	
Limit Due Date by Patron Expiry	If True automatically adjusts item due date to match patron card expiry date if expiry date sooner than due date. If False item due date applied.	True/False	LSA	
Recalls: An array of fine amount, fine interval, and maximum fine.	An array of fine amount, fine interval, and maximum fine. For example, to specify a new fine rule of $5.00 per day, with a maximum	Text	LSA	Brackets are required in the text.

Setting	Description	Data type	Edited by	Notes
	fine of $50.00, use: [5.00,"1 day",50.00]			
Recalls: Circulation duration that triggers a recall.	A hold placed on an item with a circulation duration longer than this will trigger a recall. For example, "14 days" or "3 weeks".	Duration	LSA	
Recalls: Truncated loan period.	When a recall is triggered, this defines the adjusted loan period for the item. For example, "4 days" or "1 week".	Duration	LSA	
Use in-database circ policy	Admin setting	True/False	Sitka	
Use in-database holds policy	Admin setting	True/False	Sitka	
Use legacy hardcoded receipts/slips		True/False	LSA	
circ.renew.check_penalty		True/False	Sitka	
global.credit.allow		True/False	Sitka	Not in use
org.opt_out_email_predue		True/False	Sitka	Not in use
ui.network.progress_mete	Switch off/on a bar indicating network in progress	True/False	LSA	

Acceptable formats for each setting type are listed below. Quotation marks are never required when updating settings in the staff client.

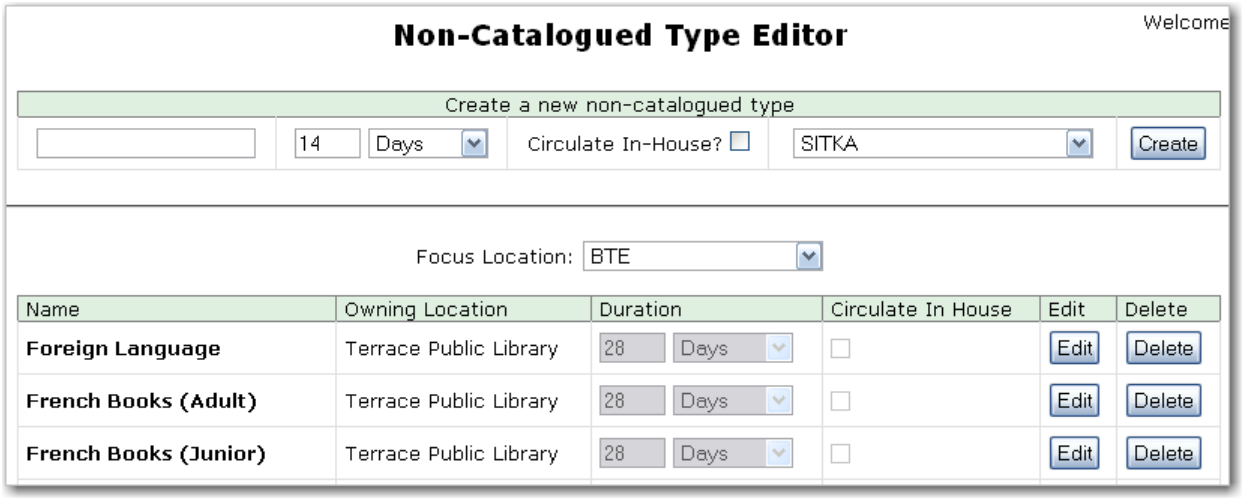
Data type	Formatting
True/false	Select value from drop-down menu
Number	Enter a numerical value (decimals allowed in price settings)
Duration	Enter a number followed by a space and any of the following units: minutes, hours, days, months (30 minutes, 2 days, etc)
Selection list	Choose from a drop-down list of options (e.g. copy status, copy location)
Text	Free text

48.14. Non-Catalogued Type Editor

This is where you configure your non-catalogued types that appear in the dropdown menu for non-catalogued circulations.

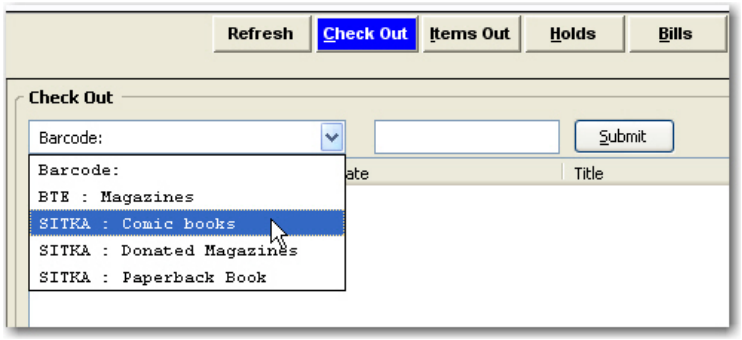
1. Select *Admin* → *Local Administration* → *Non Catalogued Type Editor*.

2. To set up a new non-catalogued type, type the name in the left hand box, and choose how many days the item will circulate for. Click *Create*.



Select the *Circulate In-House* box for non-catalogued items that will circulate in house. This can be used to manually track computer use, or meeting room rentals.

This is what the dropdown menu for non-catalogued circulations in the patron checkout screen looks like:



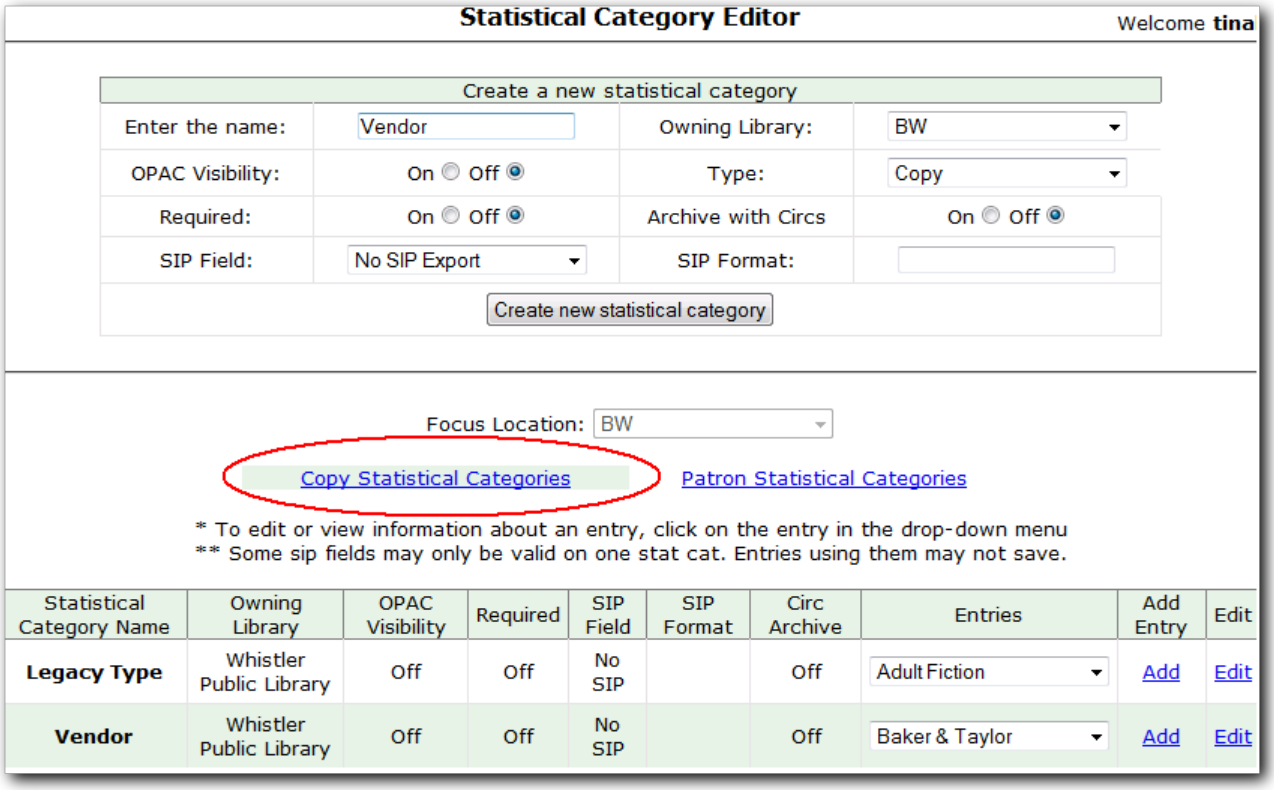
48.15. Statistical Categories Editor

This is where you configure your statistical categories (stat cats). Stat cats are a way to save and report on additional information that doesn't fit elsewhere in Evergreen's default records. It is possible to have stat cats for copies or patrons.

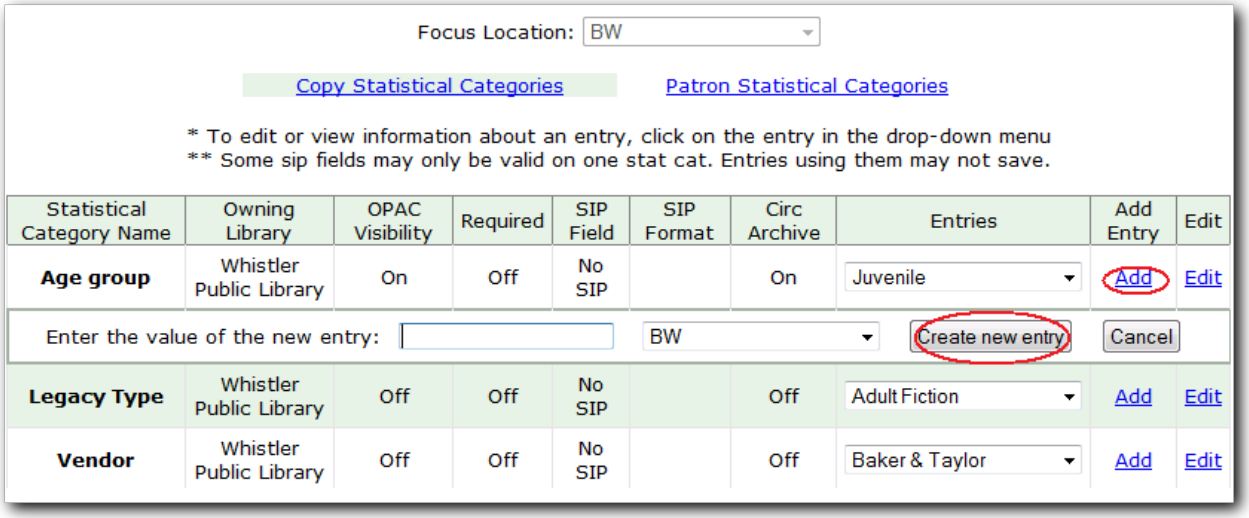
1. Select *Admin* → *Local Administration* → *Statistical Categories Editor*.

2. To create a new stat cat, enter the name of the stat cat and select *Copy* or *Patron* in the dropdown menu. Check the respective *On* or *Off* radio buttons beside each option. And then click *Create new statistical category*.

   - *OPAC Visiblity*: If On, the stat cat and its value are displayed in Copy Details on OPAC.
   - *Required*: If On, the stat cat becomes mandatory.
   - *Archive with Circs*: If On, the stat cat and its value are kept in aged circulation records.



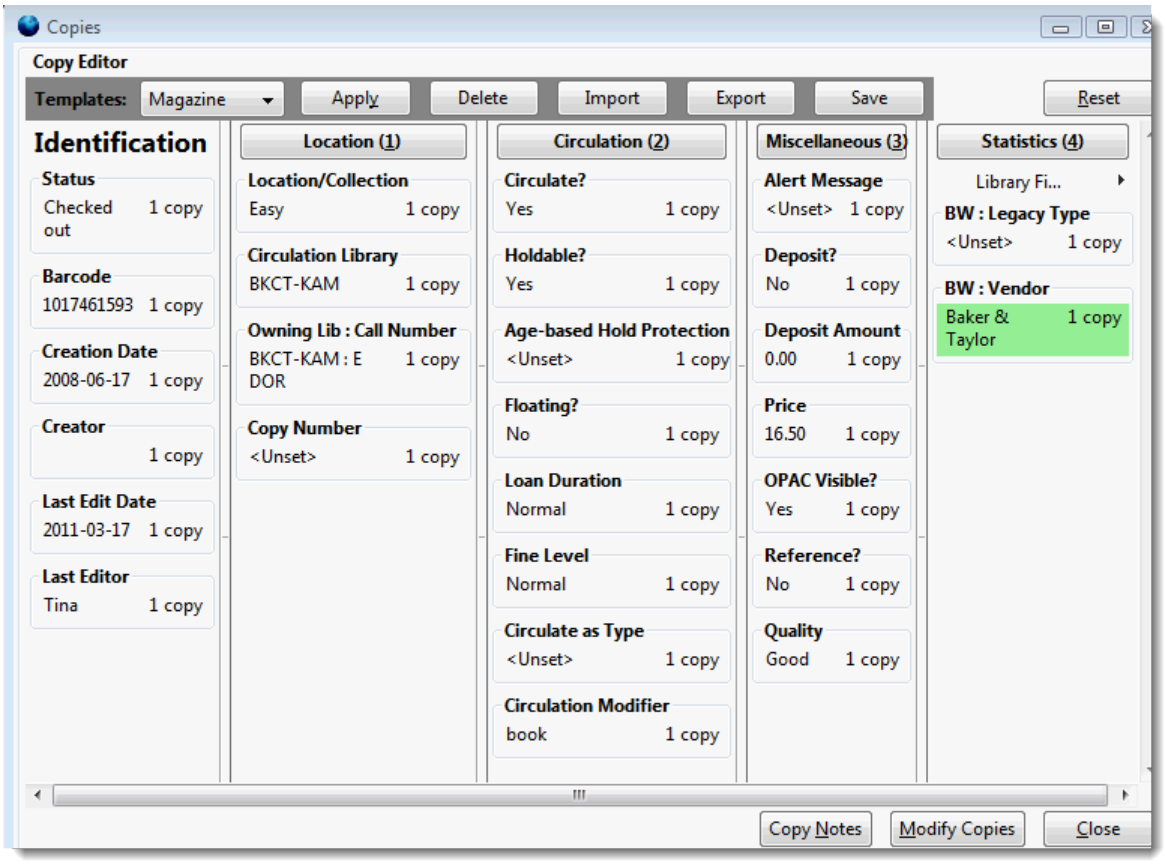
3. To add stat cat values, click *Add* in the line of the stat cat. Type in the value, then click *Create new entry* button. Confirm on the prompt. Repeat these steps if you need add more values.



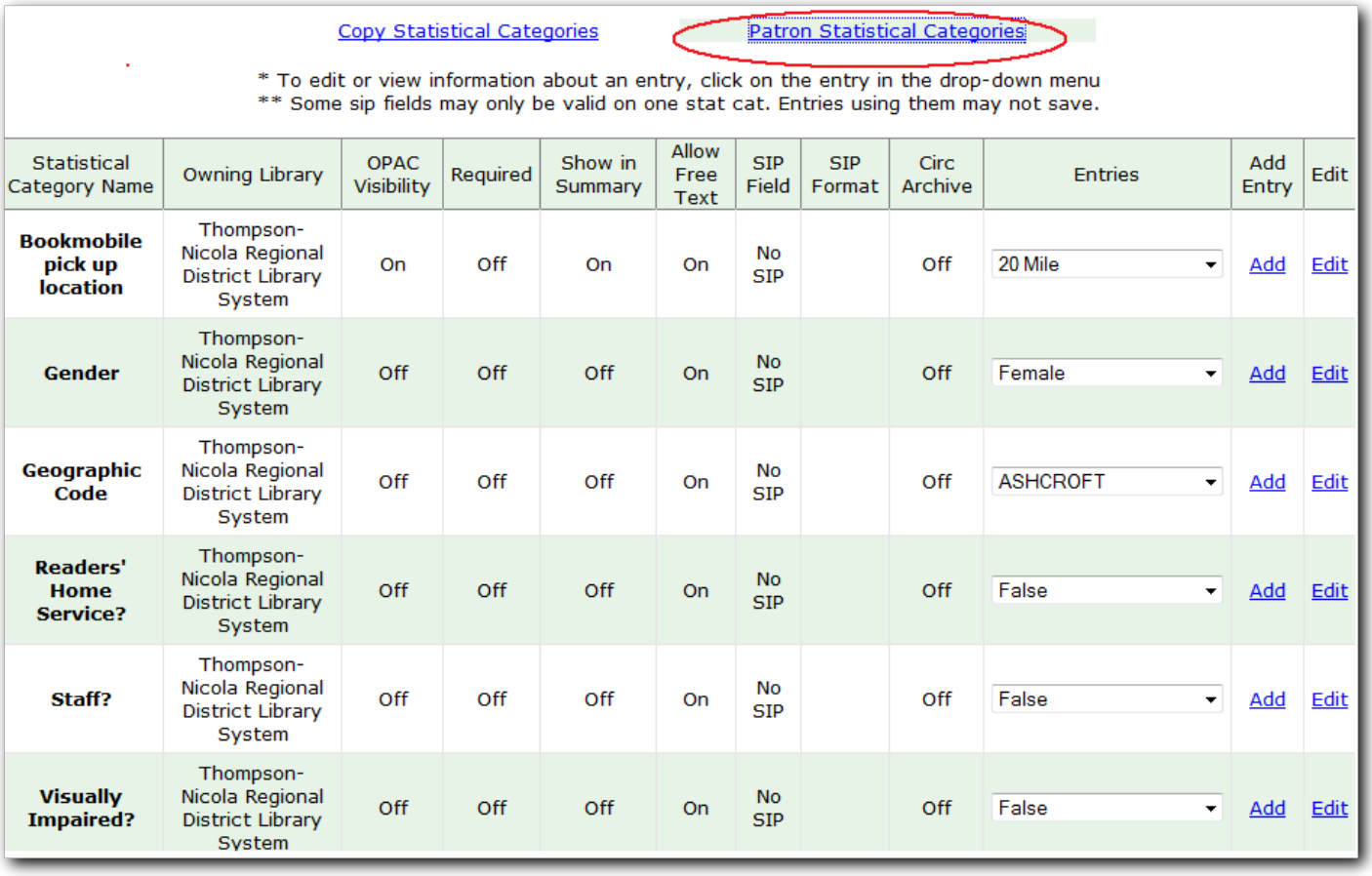
4. Clicking *Edit* on the above screen allows you to change the stat cat name and/or its properties.

5. **Copy stat cats.** The image above shows some examples of copy stat cats. You would see these when editing items in the *Copy Editor*, also known as the *Edit Item Attributes* screen. You might use copy stat cats to track books you have bought from a specific vendor, or donations.

This is what the copy stat cat looks like in the *Copy Editor*.



Patron stat cats. Below are some examples of patron stat cats. Patron stat cats can be used to keep track of information like the high school a patron attends, or the home library for a consortium patron, e.g. InterLink. You would see these in the lower part of registration/edit patron screen.



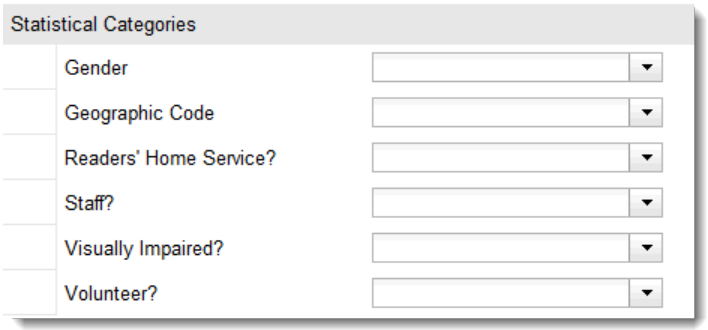
Copy Statistical Categories | Patron Statistical Categories

* To edit or view information about an entry, click on the entry in the drop-down menu
** Some sip fields may only be valid on one stat cat. Entries using them may not save.

Statistical Category Name	Owning Library	OPAC Visibility	Required	Show in Summary	Allow Free Text	SIP Field	SIP Format	Circ Archive	Entries	Add Entry	Edit
Bookmobile pick up location	Thompson-Nicola Regional District Library System	On	Off	On	On	No SIP		Off	20 Mile	Add	Edit
Gender	Thompson-Nicola Regional District Library System	Off	Off	Off	On	No SIP		Off	Female	Add	Edit
Geographic Code	Thompson-Nicola Regional District Library System	Off	Off	Off	On	No SIP		Off	ASHCROFT	Add	Edit
Readers' Home Service?	Thompson-Nicola Regional District Library System	Off	Off	Off	On	No SIP		Off	False	Add	Edit
Staff?	Thompson-Nicola Regional District Library System	Off	Off	Off	On	No SIP		Off	False	Add	Edit
Visually Impaired?	Thompson-Nicola Regional District Library System	Off	Off	Off	On	No SIP		Off	False	Add	Edit

There are two more options when creating a patron stat cat: *Allow Free Text* allows staff to type in the values when on patron registration/edit screen; *Show in Summary* displays the stat cat, if there is a value, in patron summary.

This is what the patron stat cat looks like in the patron registration screen.



Statistical Categories

Gender

Geographic Code

Readers' Home Service?

Staff?

Visually Impaired?

Volunteer?

48.16. Surveys

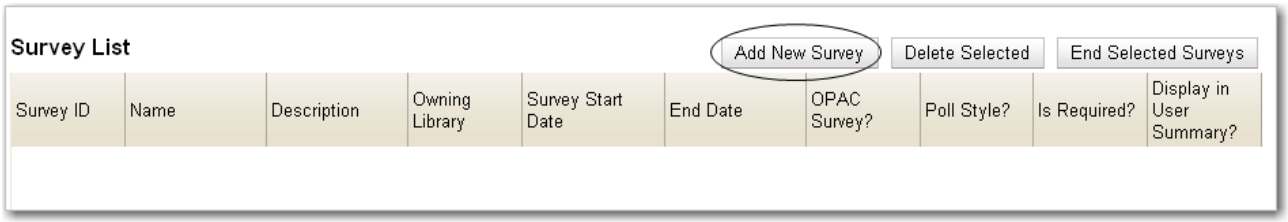
This section illustrates how to create a survey, shows where the survey responses are saved in the patron record, and explains how to report on surveys.

Surveys questions can be optional or required. Surveys come up when a patron is first registered and edited subsequently. Required survey questions have to be answered whenever the patron record is edited. Some examples of survey questions might include: *Would you use the library if it were open on a Sunday? Would you like to be contacted by the library to learn about new services? Do you attend library programs?*

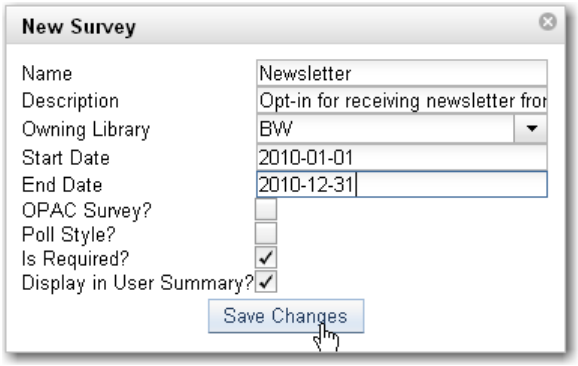
To find out the survey result you need to run reports on survey questions. For example, you could find out how many people say they would use the library if it were open on a Sunday, or you could get a list of patrons who say they would like to receive marketing material from the library. There is a shared template for reporting on patron surveys under *SITKA_templates+Patrons → Patron Surveys*. See Chapter 32, *Shared Templates in SITKA_templates* for more about shared templates and contact Sitka support if you need help tweaking this template.

1. From the *Admin* menu, select *Local Administration → Surveys*.

2. The *Survey List* will open. In this example the table is empty because no surveys have been created. Click *Add New Survey*.



3. Fill out the *New Survey* form, then click *Save Changes*.

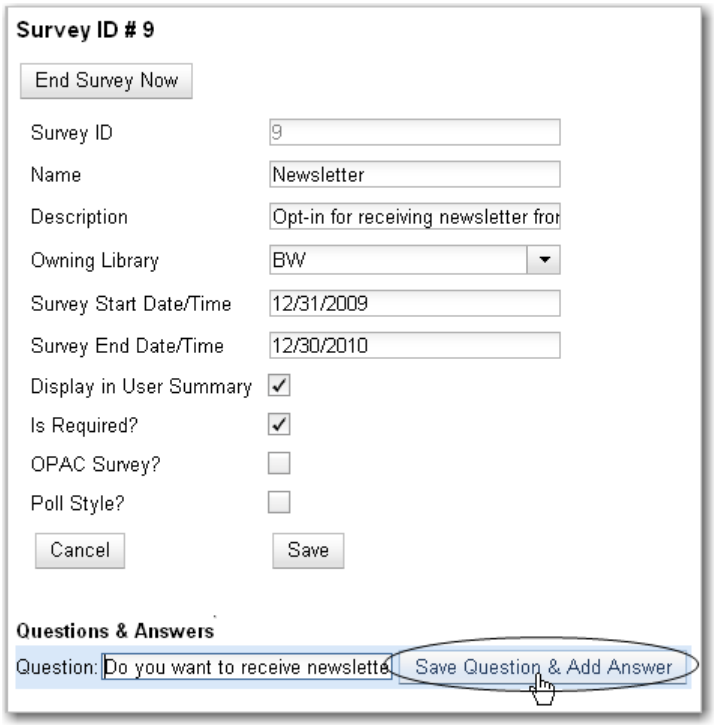


A few tips when creating a new survey:

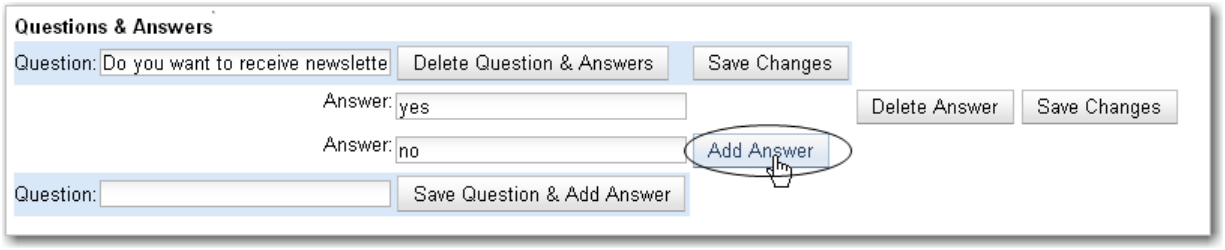
- *Start Date* must always be in the future. It is not possible to add questions to a survey after the start date.
- Dates should be in YYYY-MM-DD format
- *OPAC Survey?* and *Poll Style?* are not yet implemented - leave unchecked
- Check *Is Required* if the survey should be mandatory for all patron registration and update

- Check *Display in User Summary* to make survey answers visible in patron records in *Other Surveys*.
- Surveys can not only start from a future date.

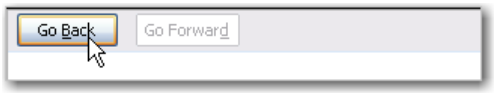
4. A summary of your new survey will appear. Type the first survey question in the *Question* field, then click *Save Question & Add Answer*. Survey questions are multiple choice.



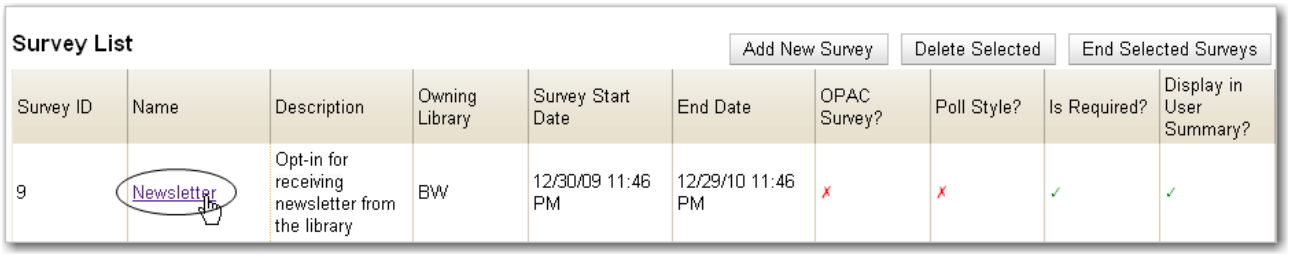
5. Enter possible multiple choice answers and click *Add Answer*. Each question may have as many answers as you like.



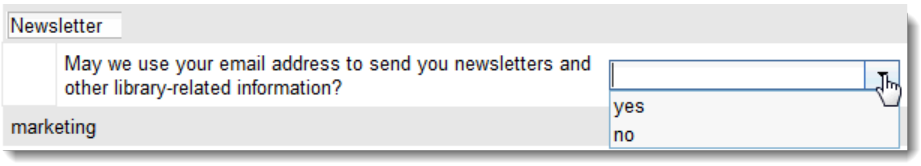
6. Repeat the steps above to add as many questions and answers as you wish. When finished click *Save*, then *Go Back* to return to the survey list.



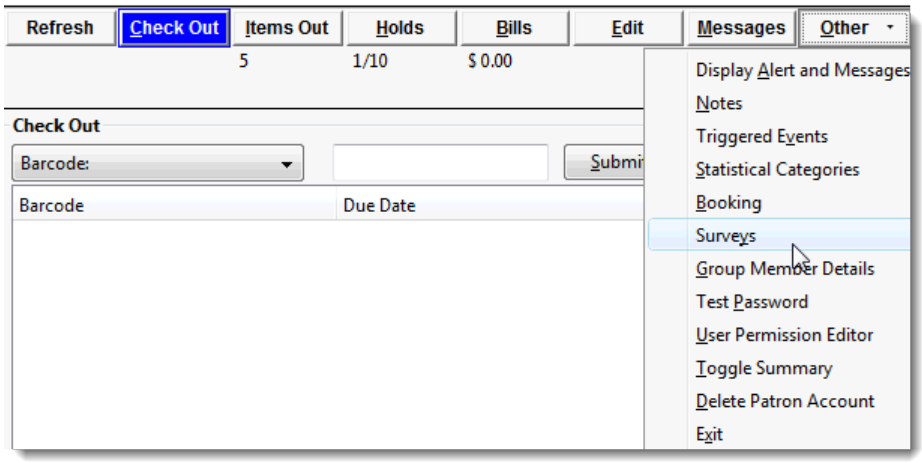
7. Your new survey will appear in the *Survey List* table. To make further changes click the survey name to open the detailed view.

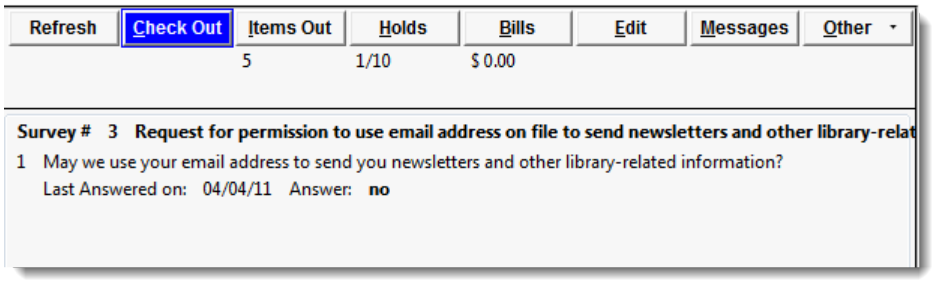


This is what the survey looks like in the patron registration/edit screen. Note that in this example this survey question appears in red and is required as the *Is Required* box was checked when creating the survey.



To see a patron's response to a survey, retrieve the patron record. Click *Other* → *Surveys* to see the response.





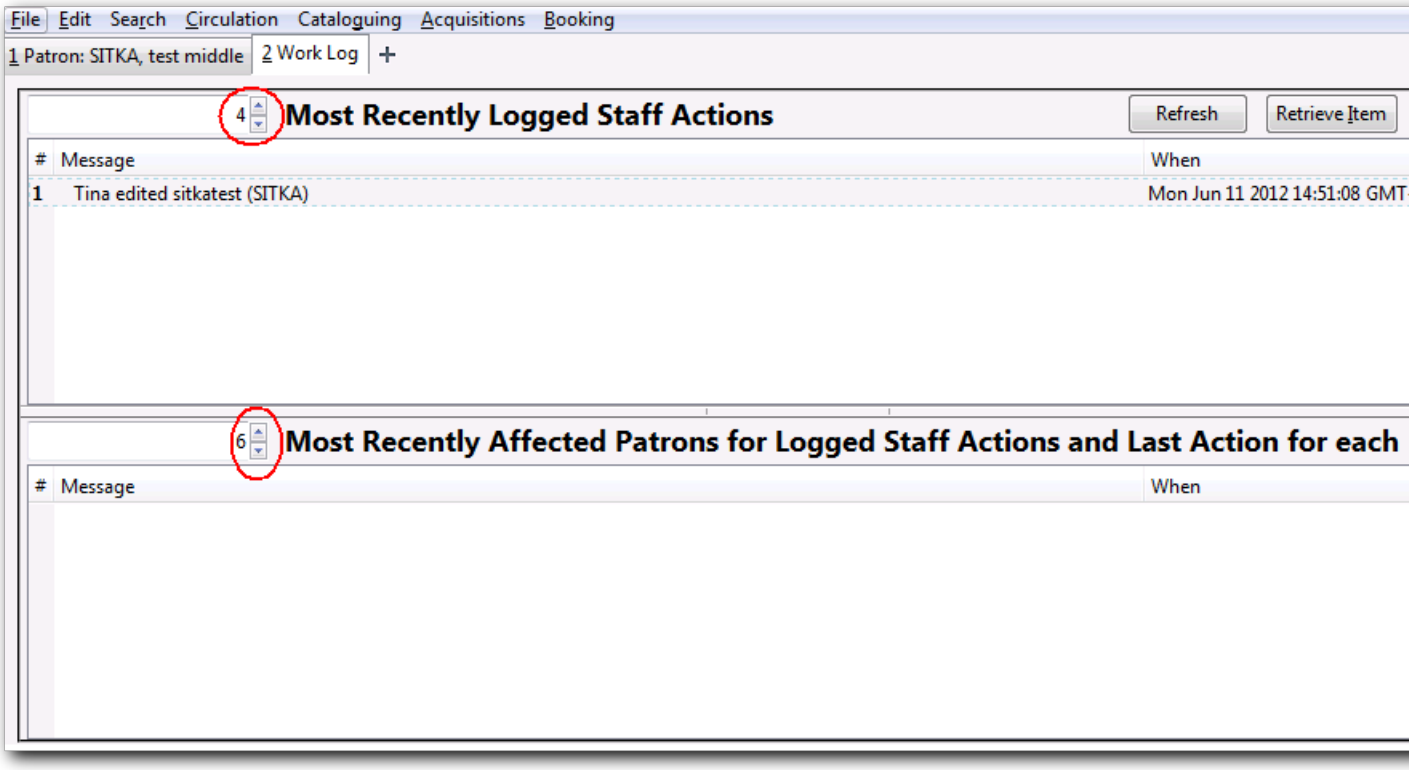
Reporting on Surveys

There is a shared template for reporting on patron surveys in the reporting interface, under *SITKA_templates* → *Patrons* → *Patron Surveys*. For more information see Chapter 32, *Shared Templates in SITKA_templates*. If you need help tweaking this template please contact Sitka support.

48.17. Work Log

1. Go to *Admin* → *Local Adminstration* → *Work Log*

2. There are two lists of records. The uppper list contains the recent staff actions, while the lower list includes the patrons affected by recent staff actions.


File Edit Search Circulation Cataloguing Acquisitions Booking
1 Patron: SITKA, test middle
2 Work Log
4
Most Recently Logged Staff Actions
Refresh
Retrieve Item
Message When
1 Tina edited sitkatest (SITKA) Mon Jun 11 2012 14:51:08 GMT
6
Most Recently Affected Patrons for Logged Staff Actions and Last Action for each
Message When

3. A default number of actions/patrons are displayed. You can increase or decrease the number by using the up or down arrow and clicking *Refresh* button.

4. If you highlight an entry, you can retrieve the item and/or patron record by clicking *Retrieve Item* or *Retrieve Patron* button.

Chapter 49. Server Administration

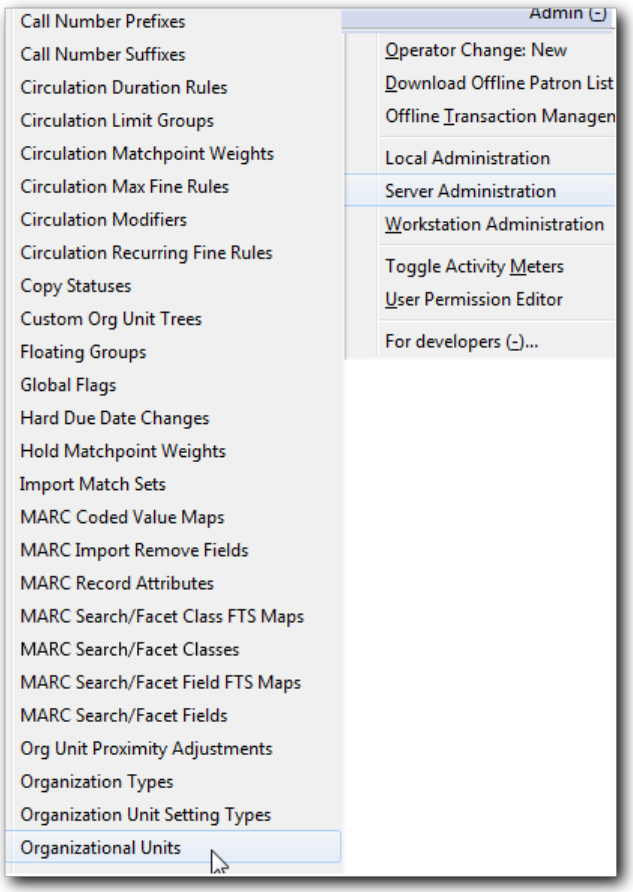
Most options under the *Admin → Server Administration* menu are global Sitka settings that cannot be changed locally. The single exception is the *Organizational Units* submenu, which allows Local System Administrators to edit library contact information, hours of operation, and addresses.

There is some view-only information that is useful under Server Administration, in particular the list of Copy Statuses.

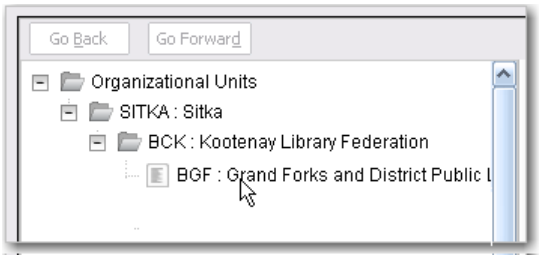
49.1. Organizational Units

Anyone with access to the staff client may view these settings but a Local System Administrator login is required to make changes.

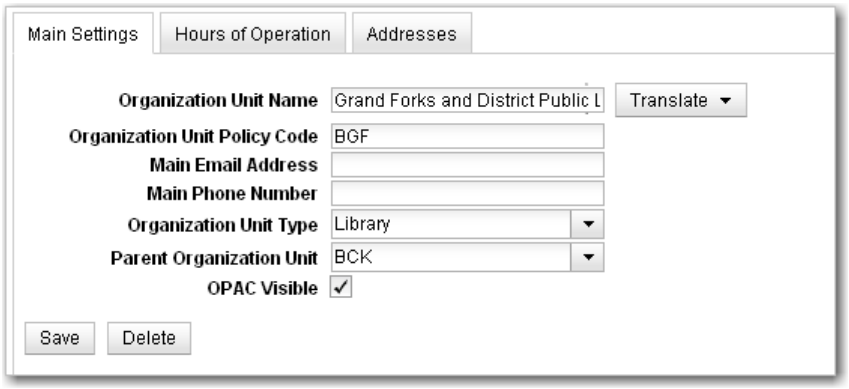
1. Go to *Admin → Server Administration → Organizational Units*.



2. Find your library from the tree on the left side of the page and click it to open settings. Multi-branch library systems will see an entry for each branch.



3. The *Main Settings* tab opens displaying settings for your library. Only *Main Email Address* and *Main Phone Number* should be edited, please leave all other settings at their default values.



4. Click *Save* to record changes.

The *Organizational Units* screen flashes green when saving changes to any tab (see screencast below, only available in the online version of the manual). If there is no flash or flash in red, please ensure you are using an LSA login and click *Save* again. Contact Sitka Support if you still cannot save the changes.

49.1.1. Library Hours of Operation

Local System Administrators can use the *Organizational Units* interface to set the library's hours of operation. These are regular weekly hours; holiday and other closures are recorded in the Closed Dates Editor.

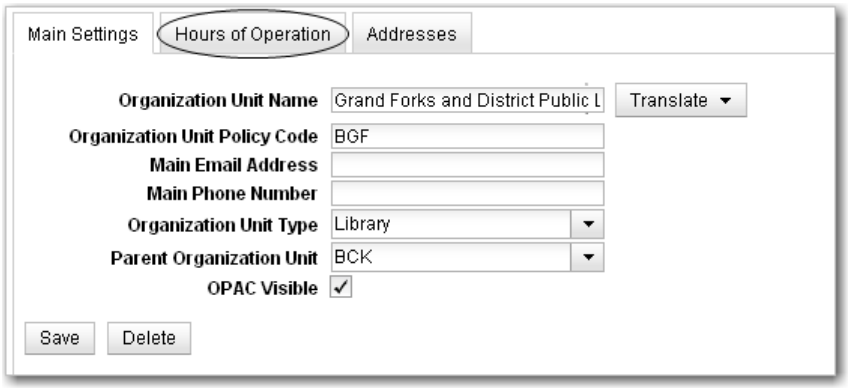
Hours of operation and closed dates affect due dates and overdue fines.

- **Due dates.** Due dates that would fall on closed days are automatically pushed forward to the next open day. Likewise, if an item is checked out at 8pm, for example, and would normally be due on a day when the library closes before 8pm, Evergreen pushes the due date forward to the next open day.
- **Overdue fines.** Overdue fines are not charged on days when the library is closed.

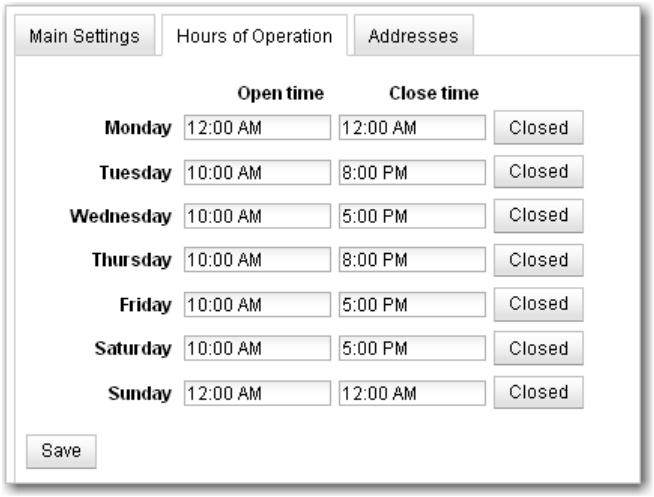
To review or edit your library's hours of operation:

1. Open the *Organizational Units* interface as described in the steps above.

2. Click the *Hours of Operation* tab.



3. Review your library's weekly hours, editing as necessary. To set a closed day click the corresponding *Closed* button. Closed days (Monday and Sunday in the example below) have open and close times of 12:00 AM.



4. Click *Save* to record any changes

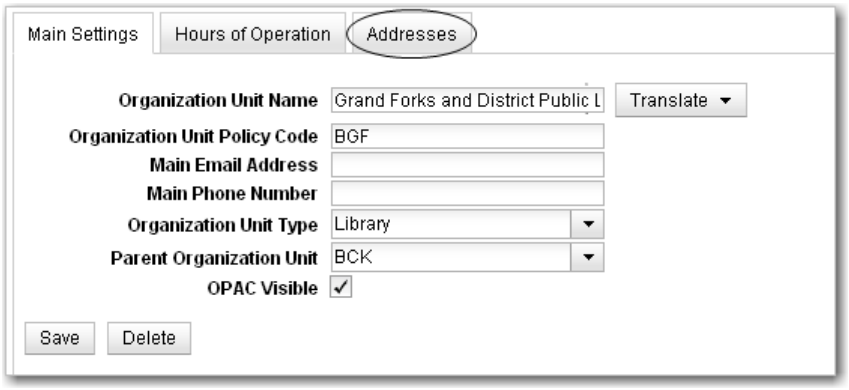
Operation hours do not contain time zone information. Please do not adjust them, even though your library is outside Pacific Time Zone.

49.1.2. Library Addresses

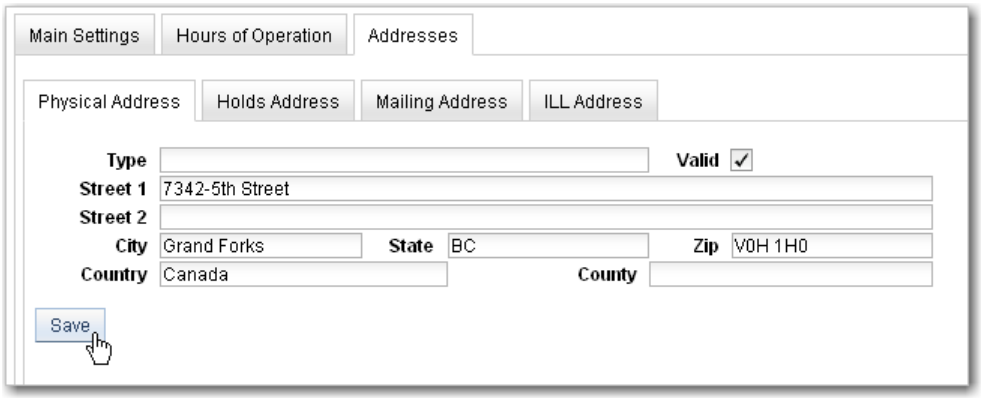
Addresses set in *Admin (-)* → *Server Administrations* → *Organizational Units* appear in patron email notifications, hold slips, and transit slips. Local System Adminstrators should ensure that the *Mailing*, *Holds*, and *Physical* addresses are set correctly.

1. Open the *Organizational Units* interface as described in the previous section.

2. Click the *Addresses* tab.



3. There are four address tabs: *Mailing*, *Holds*, *Physical*, and *ILL*. Sitka Support recommends setting the first three at a minimum. The *Holds Address* appears on transit slips when items are sent to fulfill holds at another branch. The *Mailing* address is used in notices.



4. Click *Save* to record changes for each tab.

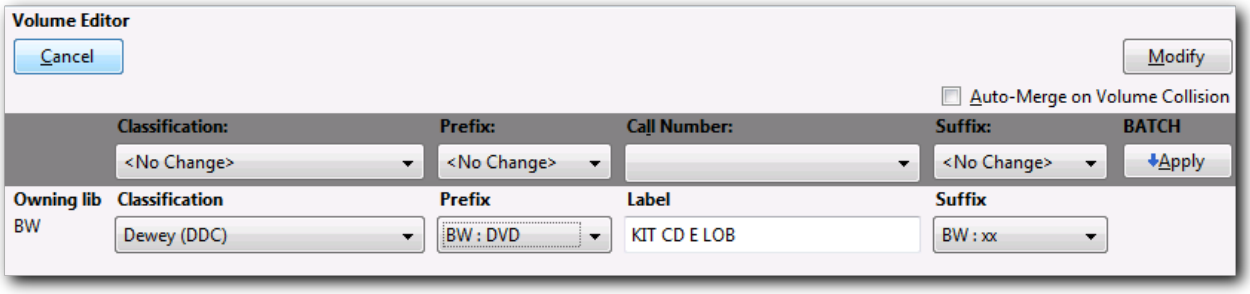
The value in *State* (Province) field in *Mailing* address is used to generate the URLs to *My Account* link in email notices. To ensure correct URLs, please always use BC for BC libraries or MB for Manitoba libraries.

The *Valid* checkbox is an optional setting that does not affect current Evergreen functions, but the Sitka Support team recommends checking it for all correct addresses.

49.2. Call Number Prefix and Call Number Suffix

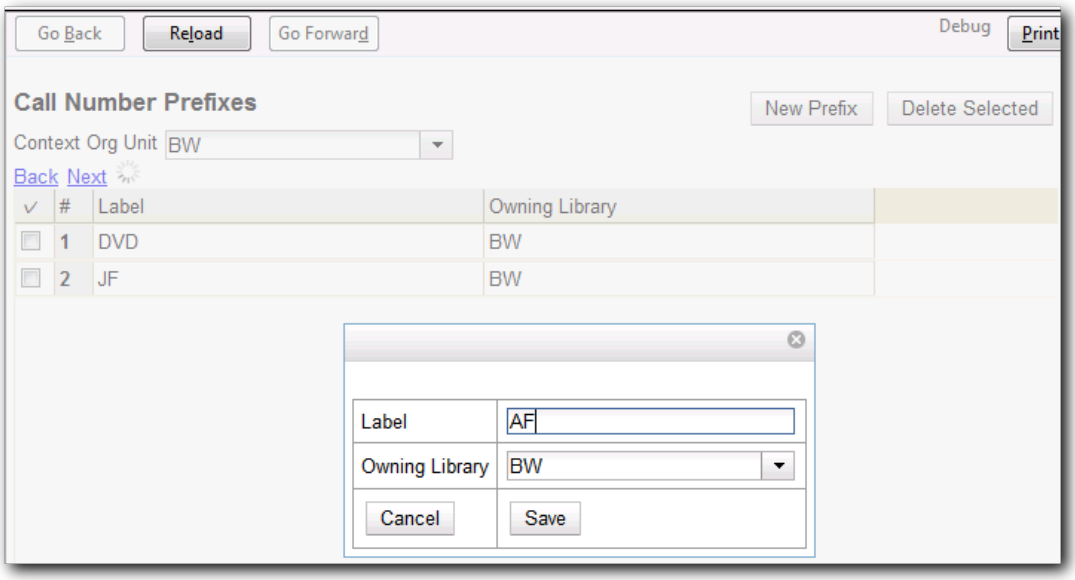
If you library uses prefixes and/or suffixes in call numbers, you can build a standard list, which will be displayed as dropdown lists when creating/editing call number record.

This is how it looks on the call number creating/editing screen.



To create a call number prefix/suffix, go to *Admin* → *Server Administration* → *Call Number Prefix (Suffix)*

Click *New Prefix (Suffix)*. Type in the label. Choose your library as the *Owning Library*, and then *Save*.



To delete a prefix/suffix, check the record, and then click *Delete Selected*.

Call Number Prefix/Suffix created here are different from *Label Prefix/Suffix* created on *Copy Location Editor*. The former are displayed as part of call number in OPAC, while the latter are on printed labels only.

49.3. Copy Statuses

This table describes the copy statuses in use by Sitka, updated as of January 2012.

If the *Sets copy active* is set to NO, an item created with this status will not have the *Active Date* field filled. The date will be filled later when the item achieves a status with *Sets copy active* is set to YES.

Item Status	Definition	Holdable	OPAC Visible	Sets copy active
Available	Item is on the shelf	Yes	Yes	Yes
Bindery	Sent to be rebound	No	Yes	No
Cataloguing	Item is being catalogued or in cataloguing department	Yes	Yes	Yes
Checked out	Item is on loan	Yes	Yes	Yes
Claimed Returned	Patron reports item has been returned. (Libraries develop own procedure for deciding when to make an item Claimed Return)	No	Yes	Yes
Damaged	Damaged and may not circulate again	No	Yes	Yes
Discard/Weed	Item is no longer in collection, it has been weeded or discarded	No	No	Yes
In process	Item is being processed and will soon be available	Yes	Yes	No
In transit	Item is travelling between libraries and remains in the In Transit status until checked in	Yes	Yes	Yes
Lost	Declared lost by patron or library (either manually or automatically)	No	Yes	Yes
Mending	Item is being repaired	Yes	Yes	Yes
Missing	Item cannot be found	No	Yes	Yes
On display	Item is on display and is not in its usual shelving location	Yes	Yes	Yes
On holds shelf	Item is awaiting pick-up by patron. Item is usually on a "holds shelf" within the library	Yes	Yes	Yes
On order	Item has been ordered but not yet received from a vendor	Yes	Yes	No
On reservation shelf	Used with room/booking module. When an item has been booked/reserved, it is placed in a unique location, ready for pick-up	No	Yes	Yes
Reserves	In reserves collection	No	Yes	Yes
Reshelving	Item has been returned but not yet shelved. Status automatically changes to Available after 24 hours	Yes	Yes	Yes
Storage	On-site or off-site storage	Yes	Yes	Yes
Temporarily Unavailable	Not available for patrons to borrow but will become available at a later date	No	No	Yes

49.4. Hard Due Date

One or more hard due date(s) can be set up for a library to force the circulation due on selected date(s). The hard due date is used in the circulation policy based on patron profile and/or item circulation modifier. It may be used to extend or shortern the regular loan duration. For example, it may be used to grant faculty members term loan by an *Always Use?* TRUE hard due date, or to force all students to return their items by the end of the term by an *Always Use?* FALSE hard due date, which takes effect when the regular due date falls after the hard due date. Please contact Sitka Support if you wish to use hard due date.

49.5. Floating Group

Evergreen 2.6 supports floating collections. Floating items stay at the checkin library, instead of being sent back to the item's original circulating library. *Floating Groups* are used to limit the range of libraries that an item can float within. Please contact Sitka Support if you wish make all or partial of your items float within selected libraries/ branches.

Chapter 50. Evegreen Self Check Administrative Set-Up

The information in this section is specific to the native Evergreen Self Check which is available to all libraries. For information regarding a third party self check please contact the vendor for that third party self check.

50.1. Initial Set-Up

1. Library sets up a computer specifically for self check with the following:
   - a mouse
   - a barcode scanner
   - library security system *(RFID pad, demagnetizing equipment, etc.)*
   - a keyboard
   - a receipt printer
   - Internet Browser

     The self check is known to be compatible with Chrome, Firefox and Internet Explorer.
   - a method for locking down access so patrons cannot use the computer for other functions

     Sitka Support recommends that you consult with your local IT support on the best method to lock down your computer.
2. Library contacts Sitka Support to get a self check interface set up with the library's logo and colours.
3. Sitka Support supplies library with URL for self check and a self check specific Local System Administrator account.
4. Library saves URL as a favourite in browser or as a shortcut on the computer's desktop for easy access.
5. Library sets needed self check library settings. See Table 48.13, “Self Check”.
6. Library teaches patrons to use self check.

For instructions on using the native Evergreen Self Check see Chapter 11, *Self Check*.

Chapter 51. Deleting Inactive Cards and Patron Accounts by Sitka's In-house Patron Deletion Tool

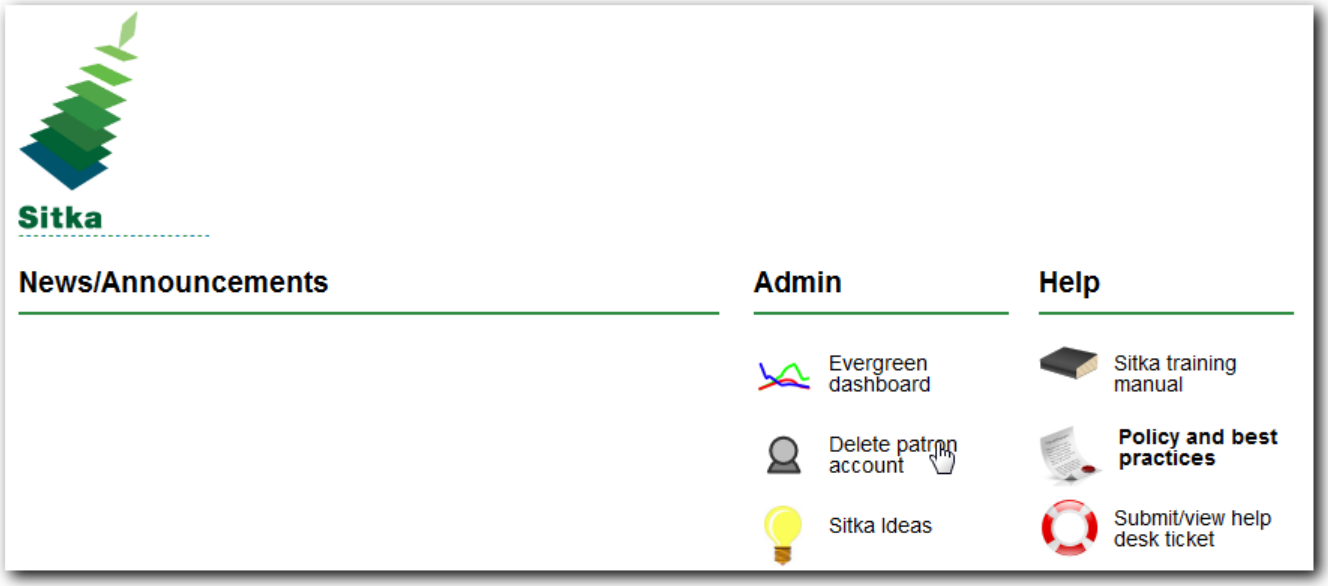
The patron deletion tool developed by the Sitka Support team allows Local System Administrators to delete inactive cards and patron accounts. This is done outside patron's records and a small batch of barcodes/records can be deleted at once. The table below describes a few scenarios where this tool may be used.

Scenario	Action
An active patron lost a card and was issued a new one (using *Replace Barcode*)	Delete the lost card (optional)
A patron is no longer active and their account should be removed completely	Delete patron account
An active patron has more than one account	Merge the accounts. Choose the card number that you want to keep as the lead record. See Section 6.6, “Merging Patron Records”.

51.1. Deleting Inactive Cards

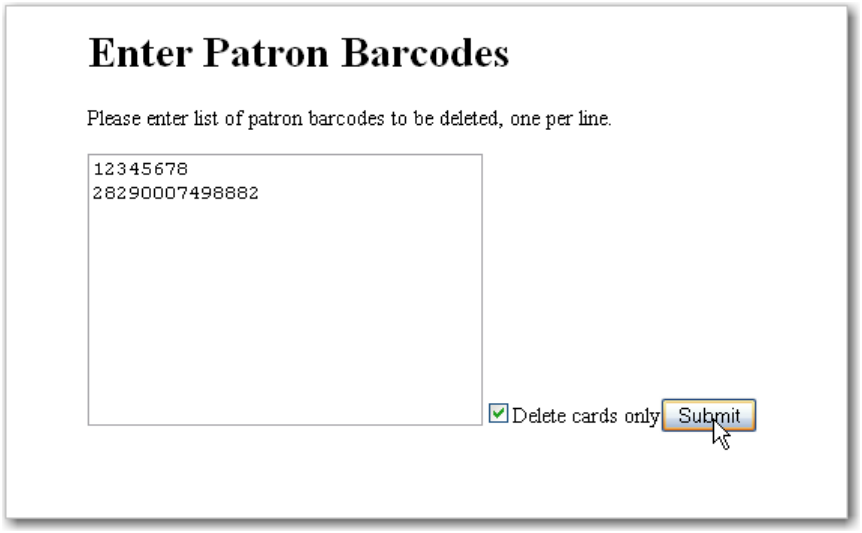
When a patron's card is marked lost and a new barcode is assigned, the old barcode remains in the Evergreen database as an inactive card. Deleting lost or inactive cards is optional. Patrons cannot check out items or log into the OPAC with an inactive card, but the lost cards can be used to retrieve active patron data in the staff client. Whether a library routinely deletes inactive cards is a matter of local policy.

1. To delete inactive cards, start a new tab by *File* → *New Tab* or **CTRL T**. Click *Delete Patron Account* under *Admin*.

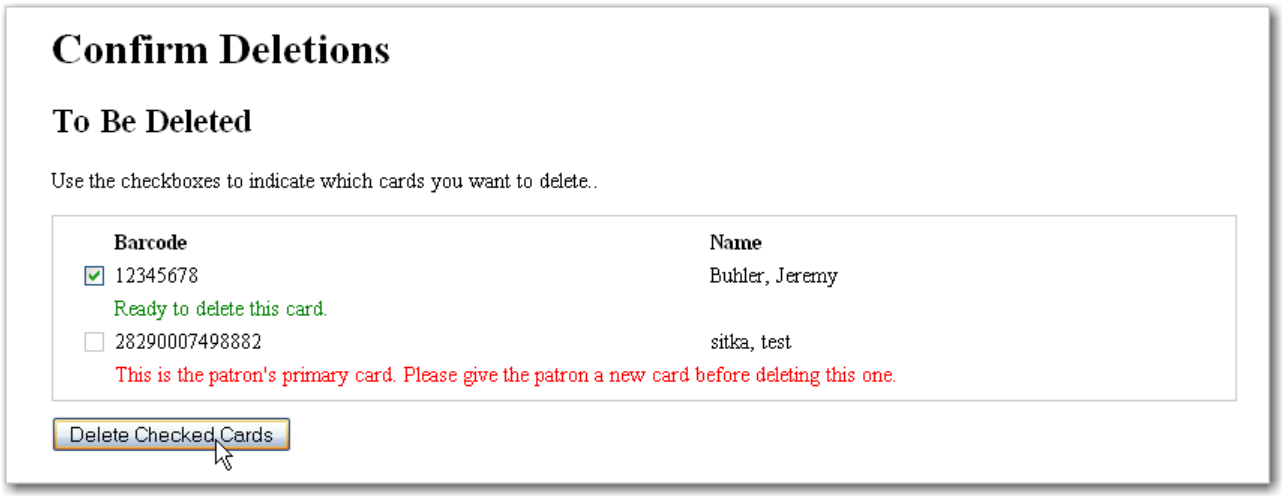


2. Login with a Local System Administrator username and password.

3. Enter one or more inactive cards to delete (one barcode per line). Ensure the *Delete cards only* box is checked, then click *Submit*.



4. After a few seconds the confirmation screen appears (for multiple cards it may take longer). It is not possible to delete a patron's primary card. Review patron data, select the card(s) you wish delete, then click *Delete Checked Cards*.


Confirm Deletions
To Be Deleted
Use the checkboxes to indicate which cards you want to delete..
Barcode
Name
12345678
Buhler, Jeremy
Ready to delete this card.
28290007498882
sitka, test
This is the patron's primary card. Please give the patron a new card before deleting this one.
Delete Checked Cards

5. The deletion report lists successfully deleted cards.

51.2. Deleting Patron Accounts

Deleted accounts remain in the Evergreen database for reporting purposes but are no longer accessible from the staff client. The deletion tool checks the following before deleting any account:

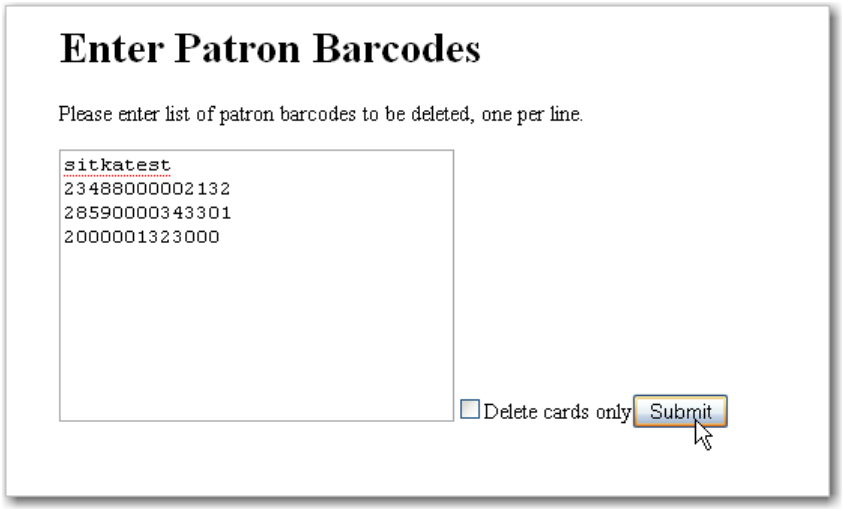
- **Open circulations.** Accounts with items checked out cannot be deleted
- **Active holds.** Accounts with active holds cannot be deleted
- **Bills.** Accounts with unpaid bills are flagged but may still be deleted; if deleted the bills are voided

If deleting a duplicate record for an active patron please see Section 6.6, “Merging Patron Records”

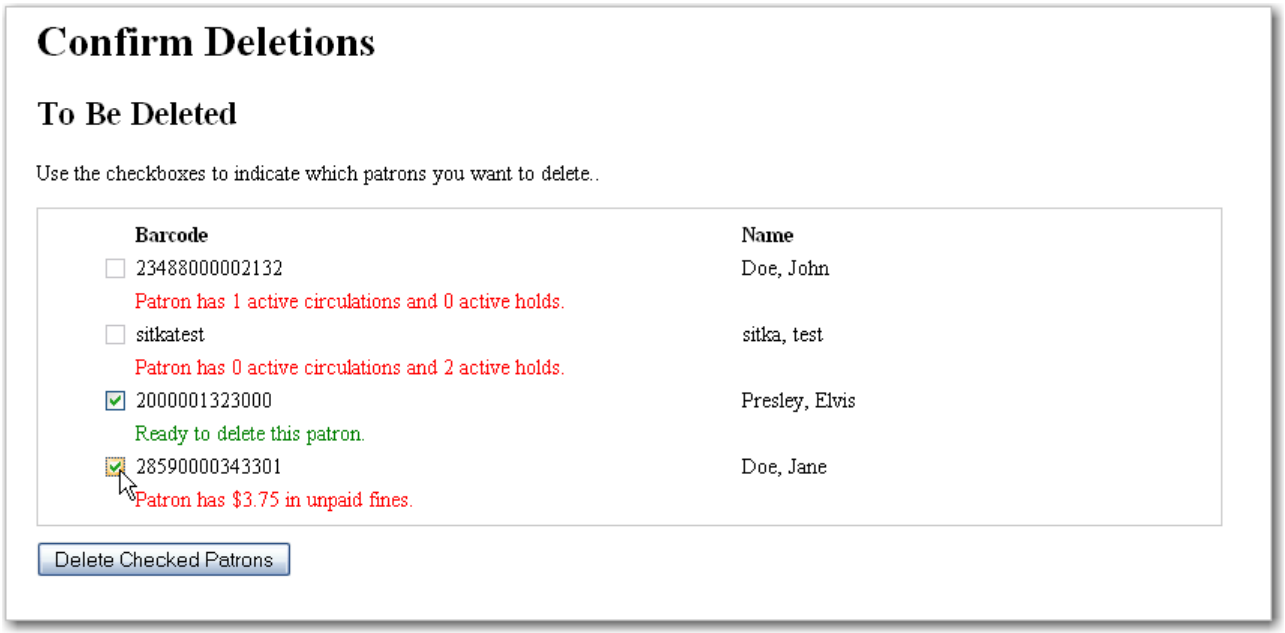
1. To delete patron accounts, start a new tab by *File* → *New Tab* or **CTRL T**. Click *Delete Patron Account* under *Admin*.

2. Login with a Local System Administrator username and password.

3. Enter one or more accounts to delete, one per line, then click *Submit*.



4. The confirmation screen appears (if deleting multiple accounts this may take longer). Accounts that cannot be deleted because of active holds or circulations are flagged and the check-boxes greyed out. Accounts with outstanding bills are un-checked by default but can be selected to void the fines and proceed with deletion. Click *Delete Checked Patrons* to continue.



5. The deletion report lists successfully deleted accounts.

Deletion Report

Patrons Deleted

2000001323000
28590000343301

Chapter 52. Courtesy, Overdue, and Hold Notices

Patrons with email addresses in Evergreen receive pre-due email reminders three days before items are due. Evergreen also generates email and optional print notices for overdues and holds. Customized overdue letters are also available.

There are three email addresses on the notices besides the recipient's email: *From*, *Reply-To* and *Errors-To*. The *From* address has to be the BC Libraries Cooperative's email address. The *Reply-To* and *Errors-To* addresses are from the *Sending email addresses for patron notices* setting in the Library Settings Editor. You must specify a address in this setting. This ensures patron replies are directed to the email of your choice. Bounced emails are also directed to this email address so staff can alert patrons when there is a problem with their email.

52.1. Library Courtesy Notices

Library courtesy notices, also referred to as pre-due notices, are generated and sent via email to patrons three days before an item is due. Only patrons with email addresses in Evergreen receive courtesy notices.

These emails are not spam and should not be marked as spam by either patrons or staff.

The courtesy notice template can be customized at the federation or library level. Please contact Sitka Support for customization.

Libraries can opt out of pre-due notices using the *org.opt_out_email_predue* setting in the Library Settings Editor.

One checkout will receive only one pre-due notice. If the due date is extended via *Edit Due Date* after the pre-due notice is sent out, no new notice will be generated. Staff is encouraged to use *Renew* or *Renew with Specific Due Date* function instead of *Edit Due Date* to make sure a second notice will be generated in the due course.

52.2. Library Overdue Notices

There are three types of overdue notices according to the delivery method:

- Notices delivered by email
- Notices delivered by paper
- Notices delivered by phone

Notices delivered by email

The server sends overdue emails to patrons once a day, after hours, when the fines generator runs. The emails are generated when an item is 7 days, and then 14 days overdue (this is a global Sitka setting).

These emails are not spam and should not be marked as spam by either patrons or staff.

The overdue email notice templates can be customized at the federation or library level. Please contact Sitka Support for customization.

Notices delivered by paper

Evergreen generates a PDF file of overdue notices and emails the file to you to be printed and distributed to patrons. These notices are created and sent daily.

An empty PDF file means that there is no notice for the day due to no item filling in the overdue category. You will still receive the empty file. If you are not receiving daily PDF files please contact Sitka support.

To set up paper overdues you need to provide Sitka support with the following information:

- the receiving email address for the PDF file to be sent to.

  Ensure you inform Sitka support if you need to change the receiving email.

- the intervals at which you would like patrons to receive notices.

  The standard intervals to choose from are 1, 2, 3, 4, 5, 6, 7, 8, 9 or 10 weeks after the item becomes due. The intervals define when a second, third, or fourth, and so on, letter is sent out.

  The 1 and 2 weeks overdue notices are sent to patrons without email address only. From the 3 weeks overdue notice onwards it is sent to all patrons.

A final notice which includes billing information can be set to coincide with the system automatically marking long overdue items to lost. See Final Notices for information on setting up this notice.

- the wording you would like to be used on each notice.

  This wording of the paper notices is customizable by library. PDF notices are set up through the Sitka support team and cannot be modified in the staff client. Please submit required revisions to Sitka support.

Notices delivered by phone

You can set up a recurring report to generate a list of overdues for all patrons, or for those without an email address only. Then you can phone each person individually. You may specify an email address to receive an email reminder each time a list is generated. There are two shared templates for overdue reports in the *SITKA_templates* → *Circulation* folder. See Chapter 32, *Shared Templates in SITKA_templates* for more about using shared templates. Sitka support staff will be very happy to assist if you need help in this process.

52.3. Final Notices

The final paper overdue notice sent to patrons can be set as a billing notice which includes processing fees and replacement costs. The price is taken from the price entered in the price field of the copy editor for the item. If the price field is blank the price is taken from the *Default Item Price* setting in the Library Settings Editor. The processing fee comes from the *Lost Materials Processing Fee* setting found in the Library Settings Editor.

Final notices are set up as part of the paper overdues. When setting up your paper overdues specify the interval at which you would like the final notice to be sent and provide Sitka support with the wording you would like to appear on the notice.

Libraries have the option to have Evergreen automatically mark long overdue items as lost. Contact Sitka Support if you would like to set this up for your library. Please include the interval at which you would like long overdue

items to be marked as lost. This interval can be set to coincide with your final notice so that patrons receive a bill for lost items. This does not apply to items that are manually marked lost by staff.

52.4. Hold Slip and Holds Notifications

Hold Slip

A hold slip is generated when a hold reaches ready-for-pickup status. The content of the slip can be from a shared template saved on the server (legacy slip) or a receipt template saved in individual workstations. Local hold slip template is used when the library setting called "Use legacy hardcoded receipts/slips" is set to FALSE.

Ready-for-pickup Hold Notice

The ready-for-pickup hold notification templates can be customized at the federation or library level. Please contact Sitka Support for customization.

When a hold is ready for pickup, the requester can be notified via automatic email and/or SMS Text, and/or manual phone call by staff depending on the choice made when he/she placed the hold. The selected notfication method(s) may be indicated on the hold slip. For example, if email notification is selected, the email address will be printed on the hold slip. A blank email address indicates that email notification was not selected.

1. For automatic email notice and SMS Text, it works the same way as the automatic overdue notices. The notification email/SMS Text is generated and sent to the patron 5 to 30 minutes after the item achieves on-hold-shelf status. In order to receive these notices the patron must have chosen these notification methods when placing the hold and the email address in his/her account and the given mobile number/carrier must be valid.

2. For phone notification, staff needs to phone patrons individually. Phone numbers are printed on the Hold Slips when holds are captured, if Phone Notification is chosen.

Holds Cancelled by Staff Notice

This notification is optional for individual libraries. The notification templates can be customized on library level. Please contact Sitka Support if your library wishes to use this service.

An email is sent to the requester when a hold is cancelled by staff on the Staff Client. The note put in by staff on cancellation will be included in the email explaining the cancellation reason.

Shelf Expired Holds Cancellation Notice

This notification is optional for individual libraries. The notification templates can be customized on library level. Please contact Sitka Support if your library wishes to use this service.

The emails are sent to the requesters when staff view and clear hold-shelf expired holds (click *Clear These Holds* on *Browse Holds Shelf*) on the Staff Client.

Chapter 53. Managing Internet OPAC Stations

This chapter contains some suggestions on how to manage public access to your Internet enabled online catalogue search stations in your library. They are meant as guidelines only, and their efficacy in your library will depend on many factors. Some possible factors that will affect how you manage your search stations are: do you want only Internet browser access to your catalogue, or do you want Internet access limited to a few sites, or do you want access to other applications such as printing, and so on. How you interpret and use these guidelines will be specific to your library's needs. Finally, depending on how your library network is configured you may need assistance from a system technician or administrator.

Firefox Plugins

There are numerous plugins for Firefox, which could be combined to create a kiosk-like effect. Clever patrons can still use CTRL-ALT-DEL to cancel the program.

https://addons.mozilla.org/en-US/firefox/addon/1659

If you need to restrict the workstation to specific websites, we recommend looking into plugins that advertise "parental controls"

https://addons.mozilla.org/en-US/firefox/addon/4351

Internet Explorer

Internet Explore is very prone to security problems, however there are various ways to get a kiosk in IE:

http://support.microsoft.com/kb/154780

http://technet.microsoft.com/en-us/ie/bb219517.aspx

Locking down Windows

This is possible, but it requires extensive editing of the registry. If you want to lock something specific, and you do not have a system technician available, it's possible to search the Internet for advice and follow the instructions you find, i.e.: "disable control panel". There are also numerous commercial software packages that do this.

Linux

Implementing Linux on your search stations is also an option. There are various ways that you could do this. If you use a LiveCD, it still could be possible for the patron to eject the CD and reboot the computer. A better solution is to install Linux to the hard drive. This solution provides the maximum lock-down, but is the most difficult to implement. Here are some of the easier ways to get at this solution:

http://webconverger.org/

Chapter 54. Evergreen System Requirements

Evergreen runs smoothly on most modern computers with a good internet connection. To ensure your system is ready for migration here are a few tips and minimum requirements.

Internet Connectivity

The Evergreen staff client requires persistent connectivity to the Evergreen servers to function. Most internet traffic uses moments of brief connectivity rather than a persistent connection so it is not unusual when experiencing connectivity issues to notice it in the Evergreen staff client first.

Evergreen will work down to a 3Mbps connection, but the performance will get progressively worse the lower the connection speed gets. While Evergreen will be functionally usable at 3Mbps it may of limited use at lower speeds.

Table 54.1. Recommended Internet Connection Speeds

Category	Downstream	Upstream	Latency (to Sitka)
Bare Minimum To Function	3Mbps	786Kbps	less than 200ms
Adequate	6Mbps	1Mbps	less than 125ms
Ideal	12Mbps	2Mbpbs	less than 75ms

Mbps stands for megabit per second and can also be represented as Mbits.

Kbps stands for kilobit per second and can also be represented as Kbits.

ms stands for milliseconds.

Most of the bandwidth usage in a library is not from Evergreen, but from other usage of the Internet by both staff and patrons. When staff workstations share an ISP connection with public workstations libraries ideally should have at least 1.5-2x more down/upstream capacity than what is recommended in the table above.

Staff Terminals

Staff terminals connect to the central database using the Evergreen staff client, available for download from https://bc.libraries.coop/support/staff-client-executables/ . The Evergreen staff client must be installed on each staff workstation and requires at minimum:

- Windows 10, 8, 7, or Vista operating system. Win 10 users may need to manage Win 10 privacy settings based on best practice in Windows community or on advice of your IT department or vendor.
- Mac OS X operating system.
- Linux operating system.

- a reliable high speed internet connection
- 512Mb of RAM

OPAC Terminals

There is no stand-alone OPAC client for Evergreen. Patrons search the catalogue using a web browser. Each OPAC terminal will require at minimum:

- a reliable high speed internet connection
- a web browser (e.g. Firefox, Chrome or Internet Explorer)

The OPAC will not work in Internet Explorer on computers running Windows XP. Co-op Support recommends you update your operating system or use Firefox or Chrome.

To limit your OPAC terminals to catalogue searches local configuration will be required. Please see Chapter 53, *Managing Internet OPAC Stations* for more information.

Barcode Scanners

Evergreen will work with virtually any barcode scanner – if it worked with your legacy system it should work on Evergreen.

Printers

Evergreen can use most desktop printers configured for your terminal to print receipts, check-out slips, holds lists, etc. The exception is spine label printing, which requires roll printers. Evergreen currently formats spine labels for output to a label roll printer. If you do not have a roll printer manual formatting may be required.

Evergreen might not print correctly to receipt printers using the Windows XP *Generic/Text Only* printer driver. Please use a printer-specific driver instead.

Chapter 55. Staff Accounts

Staff accounts are special patron accounts on Evergreen which have been granted more permissions to allow the owners to log into the Staff Client. Besides extra permissions each staff account has its own working location. The owner can log into the Staff Client at assigned working locations only.

There are three ways staff accounts can be set up and used in the system.

Staff and Patron Accounts

Accounts are created for staff members and given the appropriate Library Staff permission group and working location. Staff use the account for borrowing as well as to login into the staff client and perform their work.

Staff Specific Accounts

Accounts are created for staff members and given the appropriate Library Staff permission group and working location. These accounts often have something like LOGIN or STAFF as part of the name and may use a barcode such as SITKASTAFF rather than an actual barcode. Staff use the accounts only for logging into the staff client for work. Staff have a separate patron account for borrowing.

Generic Accounts

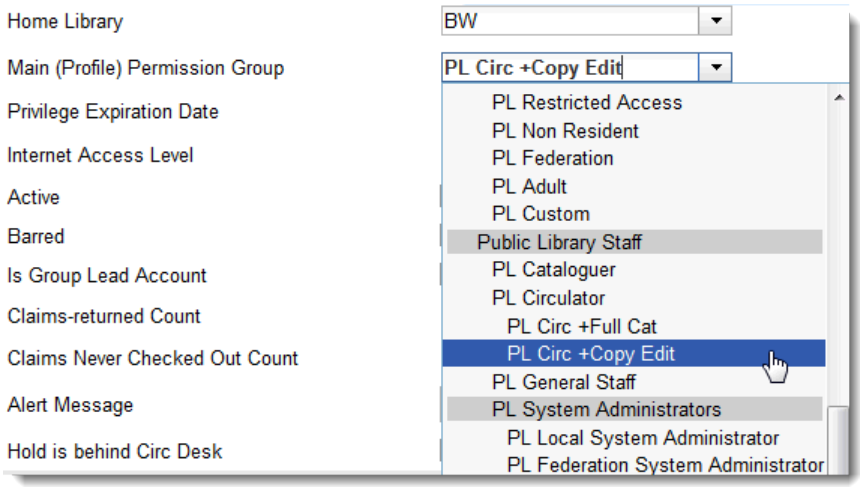
Accounts are created for functions, such as circulation, rather than for specific staff members and given the appropriate Library Staff permission group and working location. These accounts' barcodes and names are often related to their function. For example, an account for circulation may use circulation1 as the barcode and be named Dummy, Circulation. These accounts are shared by the appropriate staff. Sitka Staff strongly encourage libraries to ensure that shared usernames and passwords are kept secure and are changed as needed, especially when staff leave the library.

Sitka encourages libraries to use the method or methods that work best for them.

Generic accounts will not be granted permissions to create/run reports. Libraries are encouraged to have a dedicated account(s) for reporting purpose. The account must belong to an individual staff member and is for office use only. To avoid re-setting up reports, the owner of the account may be updated when the reporting task is passed on to another staff member.

55.1. Creating Staff Accounts

New staff accounts are created in much the same way as patron accounts, using *Circulation* → *Register Patron* or **Shift**+**F1**. Select one of the staff profiles from the *Profile Group* drop-down menu.



Creating Staff Accounts in 5 Easy Steps (For Local System Administrators)

1. Open the patron registration form and fill in the relevant information.
2. Choose a Library Staff permission group from the Main (Profile) Permission Group down down menu.
3. Save the account.
4. Retrieve the account through a patron or barcode search.
5. Assign a Working Location to the account.

Creating Local System Administrator Accounts in 5 Easy Steps

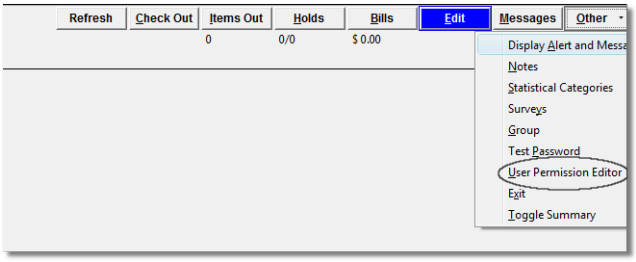
1. Open the patron registration form and fill in the relevant information.
2. Choose any Library Staff permission group from the Main (Profile) Permission Group down down menu.
3. Save the account.
4. Submit a ticket to Sitka Support asking for the account to be granted Local System Administrator permissions. Make sure you include the name and barcode for the account. If your library is multi-branch include the working locations to be assigned to the account.
5. Sitka Support will grant the permission, assign the working locations and respond to your ticket when the account is ready to be used.

55.2. Working Locations

Each new staff account must be assigned a *Working Location* which determines its access level in staff client interfaces. Accounts migrated from legacy systems already have working locations assigned.

1. To assign a working location open the newly created staff account using **F1** (retrieve patron) or **F4** (patron search).

2. Select *Other* → *User Permission Editor*



3. Place a check in the box next to the desired working location, then scroll to the bottom of the display and click *Save*.

In multi-branch libraries it is possible to assign more than one working location

55.3. Editing Staff Accounts

All staff are able to edit their own account when logged in with their account. Staff can also edit an account in a lower permission group. For example, a Local System Administrator can edit a Cataloguer account, but cannot edit another Local Administrator Account.

55.4. Resetting Your Password

Staff passwords can be reset in four ways:

1. Edit your account in the staff client while signed in as yourself.

2. Use the Forgot Your Password? link in the OPAC.

   You must have an email recorded in your account for this to method to work.

3. Have a staff member with Local System Administrator permissions assign a temporary password and then use method 1 or 2 to reset it to a secure password.

   This method only works if your account is not a Local System Administrator account.

4. Send in a request to Co-op Support to have a temporary password assigned and then use method 1 or 2 to reset it to a secure password.

55.5. Staff Account Permissions

Below is a general outline of staff account permission levels. To view a detailed list of permissions for a particular Evergreen account go to *Admin (-) → User permission editor* in the staff client.

Action	General Staff	Circulators	Circ + Copy Edit	Circ + Full Cat	Catalogers	Local System Administrator (LSA)
Basic circulation functions	*	*	*	*	*	*
CheckIn bad status overrides	*	*	*	*	*	*
CheckIn Missing/Lost/ ClaimedReturned overrides			*	*		*
CheckOut overrides				*		*
MaxRenewalReached override		*	*	*	*	*
Basic patron record	*	*	*	*	*	*
Bar patrons	*	*	*	*		*
Unbar patrons		*	*	*		*
Merge/ delete patrons						*
Patron restriction overrides		*	*	*		*
Bills and payments	*	*	*	*		*
Holds	*	*	*	*	*	*
Copy/volume records			*	*	*	*
Bib records				*	*	*
Buckets	*	*	*	*	*	*
View report output	*	*	*	*	*	*
Create/ upload offline transactions	*	*	*	*	*	*
Process offline transactions						*
Transit	*	*	*	*	*	*
Abort remote transit			*	*	*	*

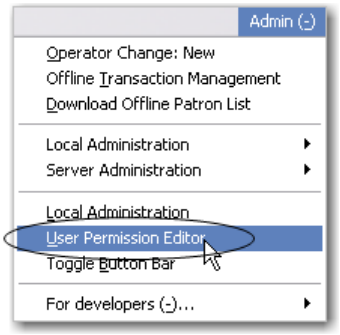
Permissions of creating/running reports are granted to individual staff members on library's request. Please contact Sitka Support.

55.6. Granting Additional Permissions

A Local System Administrator (LSA) may selectively grant LSA permissions to other staff accounts. In the example below a *Circ +Full Cat* account is granted permission to process offline transactions, a function which otherwise requires an LSA login.

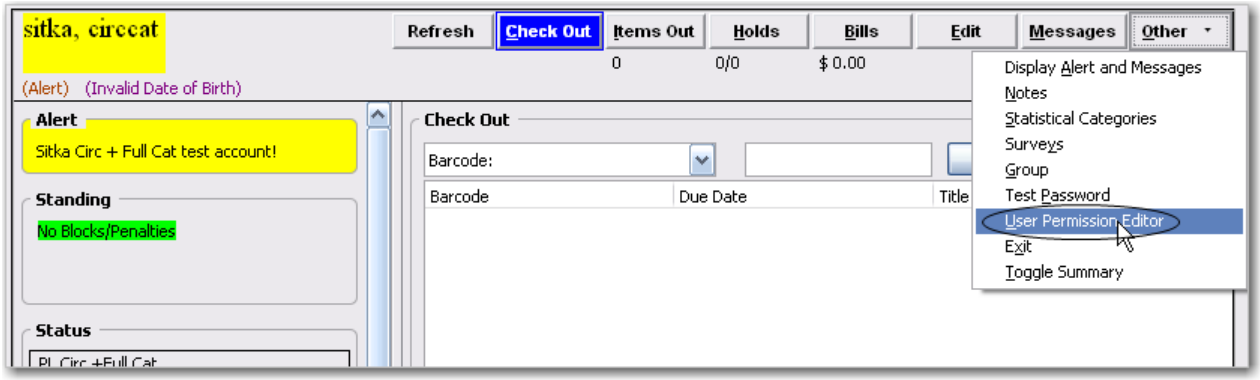
1. Log in as a Local System Administrator.

2.
   - Select *Admin (-)* → *User Permission Editor* and enter the staff account barcode when prompted

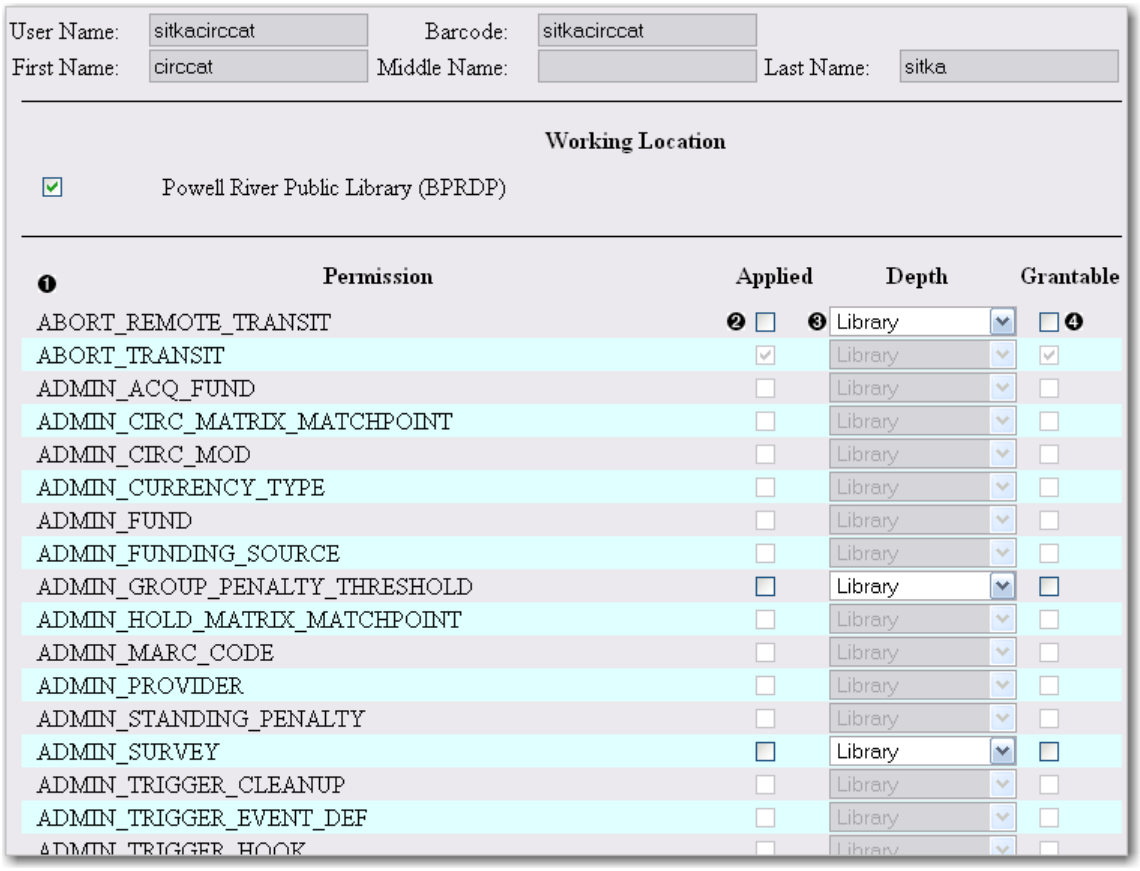


   OR

   - Retrieve the staff account first, then select *Other* → *User Permission Editor*



3. The *User Permission Editor* will load (this may take a few seconds). Greyed-out permissions cannot be edited because they are either a) already granted to the account, or b) not available to any staff account, including LSAs.



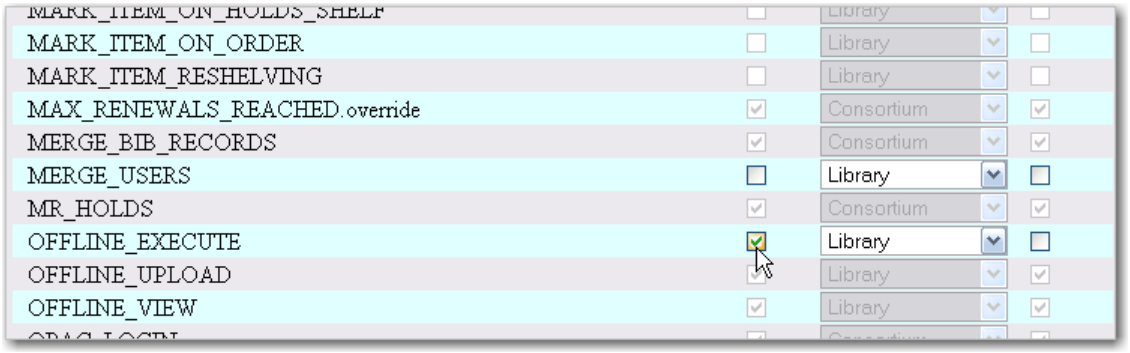
❶ List of permission names. For help correlating permissions to specific Evergreen functions please contact Sitka support.

❷ If checked the permission is granted to this account.

❸ *Depth* limits application to the staff member's library and should be left at the default. Evergreen blocks attempts to set Federation- or Sitka-wide privileges.

❹ If checked this staff account will be able to grant the new privilege to other accounts (not recommended).

4. To allow processing of offline transactions check the *Applied* column next to OFFLINE_EXECUTE.



5. Scroll down and click *Save* to apply the changes.